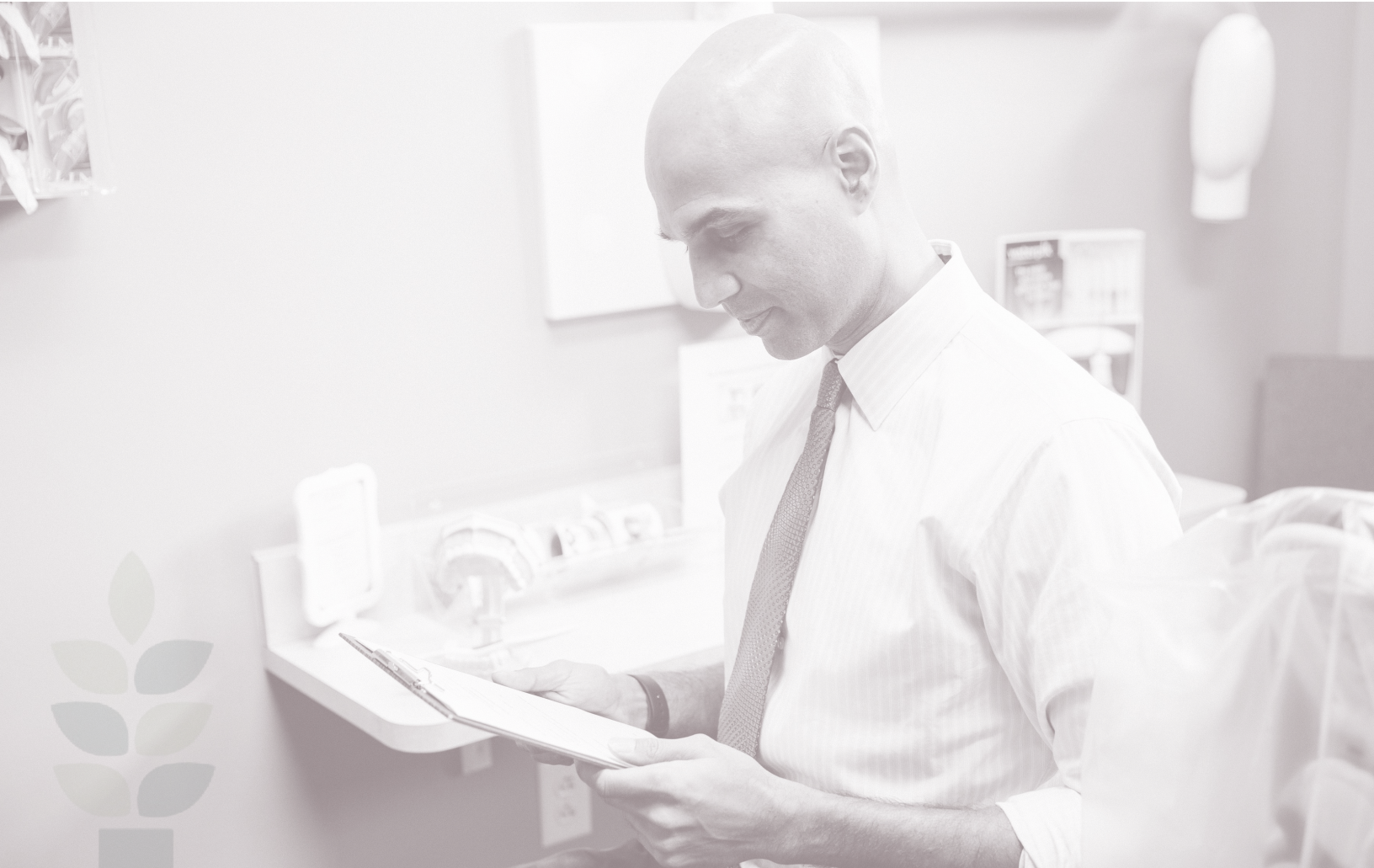




ANKUR GUPTA, DDS



# Case Presentation HANDBOOK

# "Wow" Your Patient When They First Walk In

Stand up, look at them in the eye, and shake their hand. Refer to them by name.

## Offer a compliment:

- I like your shoes, coat, shirt, glasses, purse, etc.
- Thanks for getting here right on time
- Thanks for choosing our office.
- You have a wonderful smile!

Do not hand them paperwork to fill out; instead, walk to the reception room, and go over the paperwork while sitting next to them.

Offer coffee, water, fresh fruit.

## Utilize the Law of Reciprocity

Reciprocity in social psychology refers to responding to a positive action with another positive action, rewarding kind actions.

### Give your patient something before you seat them in the operatory:

- The bag of dental goodies that you usually give patients at the end of their prophylaxis appointment
- A branded coffee mug, toothbrush, chip clip, or gift card
- A "welcome to the practice" packet, with a branded pen/gift card

### *The Law of Reciprocity:*

Upon receiving an unexpected treat, your patient will subconsciously desire to do something nice for you in return.



# Develop Trust Through Sincere Rapport

## Ask any of the following questions:

- How did you hear about our office?
- Do you live near here?
- Do you work near here?
- Have you lived in this town for a long time?
  - (If not) Where did you move from?

Then, and here is where a lot of practice and rehearsal comes in, you must then be able to follow up such questions with sincere and thoughtful rapport. You must take the time to ask more questions about the patient. Let them talk about themselves. Resist the temptation to tell the patient your story.

This must be rehearsed. This is no less important than the clinical interview, and mastery cannot be achieved until you can sincerely develop trust and rapport without awkwardness. This does not need to be rehearsed only in a team meeting setting. It can be done at parties, family events, and at seminars and courses.

## Memorize and Utilize Dale Carnegie's rules:

- Become genuinely interested in other people.
- Smile.
- Remember that a person's name is, to that person, the sweetest and most important sound in any language. Use it often!
- Be a good listener. Encourage others to talk about themselves.
- Talk in terms of the other person's interest.
- Make the other person feel important – and do it sincerely.

## RECOMMENDED READING:

*How to Win Friends and Influence People*  
Dale Carnegie

*People Buy You*  
Jeb Blount

*It is not all about me: The Top Ten Techniques for Building Quick Rapport with Anyone*  
Robin K. Dreeke



## Provide Visual Basis for Patient Interview

Tell your patient that you would like to take a few pictures so that they can participate in the examination process.

### **Equipment needed:**

a camera  
a macro lens (preferably, but not required)  
retractors  
large photo mirror

### **What photos should you take?**

Retracted lips  
Natural Smile  
Upper Occlusal  
Lower Occlusal

(note: some offices choose to take several more than this. If you are new to camera utilization in your office, start with these 4 simple photos, as training and implementation is minimal)

### **Present photos to patient**

Digital radiography software, or add-ons with Dentrix/Eaglesoft (if CPU monitors are easily accessible, and viewable by patient)  
Printing on high-quality photo paper (takes less than 2 minutes)







**Notice the new crown on 19 that was done only a year ago.**

I did that crown after performing endo on 19.

Had I taken photos back then, it would have become obvious to both the patient and myself that 18 could have definitely benefited from a crown as well.



**This patient was obviously concerned about the "chipped tooth" #4.**

Prior to camera utilization, I would have been tempted to restore only tooth #4.

This visual aid inspired an unexpected response from my patient, as she became very concerned about #5 as well, suspecting that it too would chip in the future.

We ended up restoring both thanks to the use of photography.

# Allow Your Patient to Tell Their Story

**With photos in front of both of you, begin with open-ended questions:**

- So, what made you decide to make a dental appointment?
- On a scale of 1-10, how would you rate your teeth?
  - How could we make that a 10?
- How do you feel about your teeth?
- What are your long term goals with your teeth and mouth?
- Tell me a little about your dental history, and what you would like us to do for you.
- Describe the ideal situation with your mouth and teeth? What would they look like?
- In terms of ideal teeth and mouth, what could we do for you?

**From their answer, determine what type of patient you have:**



*(a) The type who wants to tell their story, and expand on their long-term wants and needs.*



*(b) The type who really just wants a cleaning.*

If you have determined that your patient is a “type (a)” patient, good for you. Substantial potential awaits as you progress further into the new patient interview.

If you notice that **most** of your patients are “type (b)” patients, **you are doing something wrong**. Change your technique by first changing your initial open-ended question. Role play with team members, and ask your team members to respond with challenging responses, like “I am just here for a cleaning,” or, “I think my teeth are fine.”

Over time, you will find the certain questions that simply require more thought. Stick to those!

Nevertheless, you will encounter some true “type (b)” patients. If so, respect their wishes, perform a thorough comprehensive examination, and recommend treatment accordingly.

## Follow-up Questions for "Type (a)" Patients

- How long has this been on your mind?
- How has this problem affected you in the past?
- Can you be more specific? Tell me more.
- How would you feel if we could make this ideal? • How do you think we could help? • What would you like for me to tell the dentist?
- What, in your opinion, is your top priority?

### Then, as you progress through the interview, ask the following:

- How would you like to get started?
- What would you like to start with?
- What would you like to do first?

### Resist the following urges:

- Suggesting specific treatment (ortho, restorative, surgical, etc.)
- Suspecting specific diagnoses (perio, caries, edentulism, etc.)
- Explaining dental concepts and procedures
- Discussing dental insurance policies

### The bottom line: Don't talk about anything! Just listen.

**In the beginning of your training, it may be difficult for you to inspire productive dialogue.** To help in this process, have your patient fill out the form on the next page, as part of their new patient paperwork.

Then, if they marked "yes" to any of the questions, you can say, "I see you marked 'yes' to \*\*\*, why did you choose to do that?"

*Although this questionnaire may serve its purpose in the beginning of your training, we suggest that you do not depend on it, or use it as a substitute for sound open-ended questions. As time progresses, you will find yourself needing it less and less.*



# Dental Questionnaire

	YES	NO
Are you currently experiencing any dental pain?	<input type="checkbox"/>	<input type="checkbox"/>
Are you currently interested in improving the look of your smile?	<input type="checkbox"/>	<input type="checkbox"/>
If so, how?		
<input type="checkbox"/> Whiter Smile		
<input type="checkbox"/> A more aligned or "straight" smile		
<input type="checkbox"/> Replacing old caps/fillings		
Do you frequently clench or grind your teeth?	<input type="checkbox"/>	<input type="checkbox"/>
Are you nervous about dental treatment?	<input type="checkbox"/>	<input type="checkbox"/>
Would you be interested in being sedated for invasive procedures?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have missing teeth (other than wisdom teeth)?	<input type="checkbox"/>	<input type="checkbox"/>
If so, are you interested in replacement options?	<input type="checkbox"/>	<input type="checkbox"/>
Do your gums frequently bleed?	<input type="checkbox"/>	<input type="checkbox"/>
On a scale of 1-10, how would you rate your teeth? _____		
*Lastly, our office does not currently offer Botox® or dermal filler. If, in the future, we begin offering this service, would you like to be contacted?	<input type="checkbox"/>	<input type="checkbox"/>

## Utilize Visual Aids

**In the next few months, begin your collection of visual aids. These include:**

- Before and After photos of your own patients (most effective)
- Brochures from dental manufacturers and laboratories:
  - Glidewell Dental Lab
  - Nobel Biocare
  - Ivoclar Vivadent
  - Phillips Zoom®
  - American Dental Association
- Models of the following (if you provide, or plan on providing, these services):
  - Single tooth implant vs. Bridge (Straumann)
  - Implant retained denture (3M MDI)
  - Captek crown (Glidewell Dental Lab)
  - Invisalign retainers (Invisalign)
  - Old diagnostic wax-ups from anterior esthetic cases
  - Bite Splints (Glidewell)
  - Athletic Mouthguards (Glidewell)

**Do not** spend a lot of time explaining the technical aspects of these visual aids. Simply tell a story.

### FOR EXAMPLE:

*We had a patient here recently whose situation was similar to yours, and were able to help him quite a bit. Here is a photo of him before treatment, and here is a photo after. How would you like it if we could do the same thing for you?*



Courtesy of Glidewell Dental Laboratory



Courtesy of Zest Anchors®



## Classify the Situation, and Decide How to Proceed

### At this point, you must classify your patient:

- (a) This patient has several wants and needs. Radiographs and periodontal probing might slow the momentum and excitement that this patient has towards solving his/her problems.  
*It is now time to bring in the dentist. At this point, you have not taken any radiographs or periodontal charting.*
- (b) This patient may have several issues, but they are not emotion-based (periodontal disease, several broken down posterior amalgams, partial edentulism, etc.).  
*Go ahead and perform periodontal charting and take appropriate radiographs before bringing the dentist in.*
- (c) This patient simply has few issues, concerns, desires, and generally healthy teeth.  
*Go ahead and perform periodontal charting and take radiographs before getting the dentist.*

## Summarize the Patient's Situation, Twice

For every new patient interview, have an interview form ready to fill out. On it, include a cheat sheet that has all of your favorite open-ended questions. Throughout the interview process, take notes.

At the conclusion of the interview, repeat everything to your patient, and ask them if you missed anything. Let them know that you will explain their situation to the dentist.

When the dentist enters, he/she must look at the patient in the eye, introduce him/ herself, smile, and **ask the hygienist/assistant what they learned.**

Repeat everything to the dentist, while in front of the patient. Ask the patient if you missed anything.

The dentist must resist the urge to talk, explain, educate. The dentist must simply look inside the mouth, and confirm that he/she will be able to provide the solutions that the patient wants.



# Initiating Dialogue About Budget

**It is now time for the treatment plan coordinator to perform the following steps:**

- Fill out a “fee presentation form” (sample on next page)
- Either invite patient into consultation area, or go into operatory
  - Summarize the recommended dental treatment
  - Do you understand everything that was recommended today?
  - We recommended ( \*\*\* ). Do you understand why we recommended this?
- While giving the patient the paper “fee presentation form”, say, “your out of pocket responsibility for this is \*\*\* ”
- Pause – you must not break the silence. Let the patient break the silence. You look at the patient in the eye and wait for them to speak
- Be ready (through hours of rehearsal) for objections
  - Wow, I wasn’t expecting it to cost so much.
  - I need to talk to my husband/wife first
  - I just don’t have that kind of money right now.
  - I need to think about it



*Please email me at [dr Gupta@northridgevillefamilydentistry.com](mailto:dr Gupta@northridgevillefamilydentistry.com) if you are not sure how to handle such objections.*

**Here are a few helpful responses:**

- What additional information do you need to help you make a decision?
- What do you think your wife will say?
- What monthly payments would fit into your budget?

**And, when all else fails,**

- Do you mind if I call you in a few days to see where you are in the decision making process?

## Collect a Down Payment to Reserve Appointment Time

The rest is a matter of your office policy. BeBetter Seminars would be happy to help solidify your policy with regards to down payments, financing, discounts, and scheduling. Please email Dr. Gupta at [dr Gupta@northridgevillefamilydentistry.com](mailto:dr Gupta@northridgevillefamilydentistry.com).

# Treatment Plan Presentation of Fees

Date: \_\_\_\_\_

Treatment Proposed for: \_\_\_\_\_

Periodontal Therapy: \_\_\_\_\_

\_\_\_\_\_

Dental Therapy: \_\_\_\_\_

\_\_\_\_\_

Additional Services: \_\_\_\_\_

\_\_\_\_\_

Total Investment (*after insurance*): \_\_\_\_\_

Reservation Deposit: \_\_\_\_\_

I acknowledge that all treatment options have been fully explained to me and that it is my responsibility to complete treatment and follow recommended maintenance schedules.

***Fees proposed are valid for 60 days.***

For our patients with dental insurance: your insurance coverage is a contract between you and your insurance company. We will do our best to maximize your benefits, but keep in mind that you are responsible for the balance.

We require 48 hours notice to reschedule prior to appointment time. Failure to comply will result in a forfeit of your deposit which will not exceed \$50 for 30 minutes of time that you have reserved with us.

\_\_\_\_\_  
*Patient Signature*

\_\_\_\_\_  
*Date*

# Rehearsal

**None of this will happen if you simply read this handbook. You must rehearse regularly.**

Every team meeting must have adequate time devoted to role-play situations. Record these situations, and play them back at future meetings. The team members who struggle with this should not get a free pass. Rather, they should work harder. Everyone can practice at home, with their family and friends.

All you are doing is following these rules:

- Asking open-ended questions
- Asking follow-up open-ended questions
- Shutting your mouth and listening

*Upon mastery of this, you will become more likeable, more approachable, and your communication effectiveness will be more productive than ever.*



## Hygienist's Recall Patients

If your hygienist has developed mastery in case presentation, please do not stifle him/her by only allowing it to be executed during new patient examinations. Recall patients can easily be given the new patient experience by doing the following:

Say, "Before we get started, do you mind if I take a few pictures, and ask you a few questions about your long term goals with your teeth and mouth?"