

Turn More Callers Into New Patients

Effective Phrasing to Increase Call Conversion



The front-office staff of any dental practice fills a vitally important role in sustaining its growth. The way they use the telephone makes a pivotal difference in how many new patients a dental practice acquires.

Often, the front-office team is responsible for the first or second impression the practice makes on potential new patients. Their behavior determines how many inquiries result in first appointments.

Yet many practice owners and business managers don't pay enough attention to this key contribution of their front-office staff.

Dental offices spend money to make their phones ring. If front-office staff are highly effective in booking first appointments, they amplify the value of all marketing investments. Conversely, a less effective front office washes a big portion of marketing investment down the drain. They constrain the growth of the practice.

Think of it. If a dental office converts 25% of callers into new patients, it wastes 75% of the money it spends to make its phones ring.

This guide provides specific, practical recommendations for how front-office staff can improve new-patient conversions.

The recommendations are adapted from a series of training videos available through **Patient Prism Academy**, a website that offers training for dental offices.

Most of the ideas here come from Robin Morrison and Deborah Bush. For more about Robin and Debbie, please see the notes at the end of this document.



11 Tips to improve new-patient conversions on the phone

1. Get the caller's name and phone number immediately.

You may be disconnected. You want to be able to call back. The call may not end with a booked appointment. Maybe you'll want to call back to re-engage.

2. Don't put the caller on hold.

Focus your attention on meeting this caller's needs now. When you're taking phone calls, the current caller is the most important person in the world.

3. Ask all your key questions.

When people call your office to learn about your practice, they have their own agenda. They want you to answer the questions that are important to them in choosing a practice. While you want to answer their questions, you also need information to provide good answers.

Your questions give you a polite way to reassert control over the conversation. If the caller opens with a series of specific question, you can respond by saying, “I’ll be happy to answer all your questions. Would you mind if I first ask you a few questions so I can provide better answers?”

During the call, you’ll need answers to these key questions:

- What is the caller’s name and phone number?
- Why are they calling? What do they think they need?
- How urgently do they need an appointment? What discomfort, if any, do they feel? What’s the urgency?
- What factors are important to them in choosing a practice?
- How did they come to call your practice? Was it by referral? If so, from whom? Did they see an ad or a listing somewhere? If so, where?

4. Listen intently. Eliminate distractions.

Concentrate 100% on what the caller is saying.

5. Take careful notes.

To take notes efficiently, use a form that provides a checklist of the caller’s possible responses to questions.

6. Don’t read from a script.

Keep your voice natural and sincere. Respond to the needs and concerns of the caller. Do so in a way that’s natural, genuine, empathetic, and reassuring.

While you want to answer their questions, you also need information to provide good answers.

Any time you say “no,” your negative answer could end the conversation.

7. Find ways you can truthfully say “yes” and avoid saying “no.”

Frame your discussion in positive terms.

If a caller asks which insurance carriers you work with, you might say “We work with all insurance carriers, either in network or out of network.”

If the caller asks whether your practice provides a specific service, say that your practice offers a full range of dental services.

What if the caller asks whether you provide Invisalign, implants, or some service you don’t offer? Rather than saying “no,” you might say something like this:

- “Has another dentist told you that’s what you need?”
- “Sometimes people call us with the idea they need a specific service or treatment. But then it turns out they don’t need it. Or maybe they would be better off with a different service.
- “To avoid that risk, we’re happy to provide free assessments.
- “Would that be of interest to you?”

Why should you avoid answering questions about specific services? Two reasons:

- Any time you say “no,” your negative answer could end the conversation quickly. You lose the opportunity to learn more about the caller.
- If a caller decides you don’t meet her needs, you’ll never know if she really needs the service she asked about.

Someone may have given her an incorrect diagnosis.

To avoid these risks, leave it to your professional staff to make a proper diagnosis. Get the caller in to see a dentist who can make the right clinical recommendation.

As one successful dentist says, “The important thing is to get them in the chair. That’s the only way we can see what they really need. If we can’t provide it, we can make a good referral. At least we can be sure they’re getting the right care.”

8. Avoid quoting fees.

If a caller asks about specific fees, you might say one or more of these things:

- “I understand that you want to know your financial obligation upfront. But it’s hard to quote a realistic fee until a dentist has seen you.”
- “That’s why we offer a complimentary visit so you can sit down with the doctor. He’ll address your concerns and will tell you the fee for any treatment he recommends. And you’re under no obligation to accept treatment.”
- “Our rates are affordable and competitive. We also offer affordable financing options.”

If they continue to push for information about fees, you might say something like this:

“If the fee is the most important thing to you, this may not be the right practice for you. Our fees are very affordable. But we focus on providing excellent care.”

“If you feel this may be the practice for you, I would love to schedule an appointment for you. I just don’t want to do you the disservice of quoting you a wrong fee. What would you like to do?”

Several successful dental practices use this response with great results. It puts the focus on quality of care over pricing. And it avoids applying pressure.

9. Sell the benefits of your practice.

Once you understand what the caller wants and values, try to describe honestly how your practice can provide it. Be professional, credible, empathetic, and helpful.

10. At the end of the call, always offer an appointment.

11. Avoid the slightest hint of pressure.

Any time callers feel pressure to book an appointment, they are more likely to resist. Pressure suggests that your practice needs new patients. It causes the caller to wonder, “Why would a successful dentist need new patients so badly?” People tend to run in the opposite direction when they sense desperation or neediness.

If the caller isn’t ready to book an appointment, back off. End the discussion on a positive note. Leave the door open for future conversations.

Once you understand what the caller wants and values, try to describe honestly how your practice can provide it.

High-Converting Conversations for Dental Practices: Winning New Patients on the Phone



Use this conversation guide as a template. Start with this form and modify it for your practice. Improve it as you go.

WHAT TO SAY

TIPS AND NOTES

[The phone rings.]

“Thank you for calling
Dr. _____’s office.
This is _____.”

“How may I help you?”

- It’s important to pick up the phone before the third ring so it doesn’t roll over to voicemail.
- Your chance of converting the caller to an appointment declines if the call goes to voicemail.
- Your greeting is the most important part of the call. It sets the stage for the outcome of the call.
- Begin by speaking clearly and slowly. Use a welcoming tone of voice.
- Make the caller feel like you’re expecting their call, not like they’ve interrupted your day.

“I’d like to talk to someone about making an appointment.”

Or: “I’d like some information about your services.”

“That’s great!
I’ll be happy to help.”

“Would you spell your
name for me, please?”

“And may I have your
phone number in case
we’re disconnected?”

- Get the caller’s name and phone number right away, so you can call back if the call is interrupted.
- From what the caller initially says, you may recognize her as a potential new patient.
- If it’s not apparent from what she’s already said, and you if don’t recognize her name as a current patient, then ask: “Are you a current patient of our practice?”
- Or maybe ask, “When was the last time you saw Dr. _____?”
- Asking questions is better than making assumptions.
- Once you know for sure, you can continue down the appropriate path.

WHAT TO SAY

TIPS AND NOTES

“Maria, I’m glad you called.”

“We always welcome new patients.”

- Address the caller by the name he or she gives you.
- If it’s an unusual name, ask if you’re pronouncing it correctly.
- When you get her name, you can use it throughout the call.
- This will make the call much more personable.
- When you address her warmly, she’s likely to be more open about sharing information.

“Are you inquiring for yourself, or are you calling on behalf of someone else?”

- It’s important for you to understand whether the caller is calling for herself or for a child or a significant other.
- In each case, you will probably handle the call a little differently. You may emphasize different elements of the practice if she is calling for a child.
- Is the person calling to make an appointment for someone else? If so, note details about the potential patient.
- For example, ask about the age of the child.

“What prompted you to call today?”

- Give her a chance to tell you her most burning issue.

[The caller responds. You make careful notes of what he or she says.]

“Are you feeling any discomfort?”

“Are you experiencing some particular problem?”

- Is this an emergency?
- Is it a toothache? Is it an inquiry about dentures? Implants? Crown(s)? Extractions? (etc.)
- In your notes, write down the actual terms the caller uses to describe his or her problem(s).

[At this point, the caller may ask whether your practice provides specific services. Implants? Veneers? Pediatric dentistry? Extractions? Tooth whitening? Crowns? Root canals? Invisalign? They may also ask which insurance coverage you accept.]

WHAT TO SAY

TIPS AND NOTES

“Our office provides a broad range of dental services.

“We also work with all insurance carriers, whether in network or out of network.

“To help me respond to your questions, would you mind if I ask you a few more questions before I answer yours?”

If your office doesn't offer any of the services the caller asks about, redirect the discussion by asking questions.

“What services do you believe you need right now?

“What makes you think you need these services now?

“What factors are most important to you in choosing a dentist?”

- Ask questions that will help you gain insight into the caller's needs and expectations.
- These are important questions. You're essentially asking them, “What are you shopping for in a dental practice? And what are your top decision criteria?”
- Their answer is likely to tell you what they value most.
- When you have that information, you'll know what capabilities to focus on as you describe the strengths of your practice.
- Do they want low fees? Do they want a specific service such as implants, extractions, crowns, root canals, veneers, teeth whitening, or Invisalign? A fast appointment? Pediatric care? The right insurance coverage? A nearby office? A dentist who can minimize pain and fear? A friendly, tranquil environment?
- Have they received a diagnosis from a dental professional? If so, from whom? Did they self-diagnose? Did they get advice from a friend or a family member?
- All this information is very useful.
- If you don't book the appointment, at least you'll also have a better sense of why you've lost it.
- As you accumulate information of this kind, you'll know what additional services or capabilities your office might consider offering in the future.

WHAT TO SAY

TIPS AND NOTES

“Let me tell you a little about our practice.”

“Dr. ____ is a wonderful dentist.”

“He is up to date on all the latest dental procedures, and he’s very gentle too.”

“Patients love him.”

“With new patients, he performs an initial oral health evaluation. It’s comprehensive.”

“Now, have I answered all your questions?”

“If so, let’s go ahead and get you scheduled.”

“I’d like to schedule you for the initial evaluation first. Then we can schedule you for a second appointment to take care of your hygiene needs.”

“I have time available Tuesday at 2:00 pm. Will that work for you?”

Emphasize aspects of the practice the caller seems most likely to care about.

Examples:

- Strong pediatric dentistry
- Friendly, warm environment
- Latest procedures
- Painless dentistry
- Cosmetic dentistry
- Nearby, easily accessible office location
- Ability to book an appointment soon
- Free initial consultation
- Insurance coverage
- Mercury-free dentistry

- If you don’t prompt them to schedule an appointment, they might move on to call another practice.
- So never end a call without suggesting an appointment.
- Avoid asking them when they want to come in.
- Maintain control by suggesting the next available time or a few alternative times reserved for new patients.
- If patient cannot make the first available slot, give patient a choice of future times, minimizing the time between this call and the appointment. A choice gives the patient the opportunity to select the best time for her or his life, and the patient will be more apt to keep the appointment.
- By scheduling an appointment soon, you accomplish three things.
- You fill your new-patient time slots.
- You make progress toward meeting your goal for booking new patients.
- The new patient will be less likely to cancel their appointment. They’re also less likely to be a no-show.

WHAT TO SAY

TIPS AND NOTES

If they book an appointment, then move on to talking about the details of the first appointment. Set positive expectations. Offer directions to your office.

“I’d like to tell you a few things so we can prepare for your visit.”

“Is that okay?”

- After you schedule the appointment, get additional contact information so you can send appointment reminders.
- Get mobile phone number, email address, etc.
- When the caller agrees that it’s OK to talk about details, suggest that the caller fill out new-patient forms online or by coming to the appointment 20 minutes early.
- Let the patient know that the dentist will be easy to talk with.
- The dentist will want to know about their dental history, oral health concerns, and preferences.

“Whom may we thank for referring you to our office today?”

- Ask how they came to call your office.
- If they didn’t hear about you by referral, ask about how else they heard about you.
- Note their response carefully.
- The information they provide will tell you how well your marketing and referral programs are working.
- If they said they saw a billboard, ask which one.
- If they said they saw an online ad, ask what they were searching for.

“Mrs. ____ is terrific.”

“I’m so pleased she referred you.”

“I’ll be sure to thank her.”

- If they’ve been referred by a patient or a dentist, say something complimentary about the person who referred them.

WHAT TO SAY

“My name is _____.”

“If you have any additional questions, please call back. You’re welcome to ask for me.”

“I’ll be happy to answer your questions.”

“It will be a pleasure to meet you when you come in.”

“I will personally introduce to the members of our team.”

“Thank you for scheduling with us.”

They may also say they aren’t ready to book an appointment.

“Mary, I understand you aren’t ready to make an appointment.”

“If there is anything I can do to make a difference, please call me personally.”

“My name is _____. If you have any questions that come to mind later, feel free to call.”

“We will welcome you to the practice.”

“If you think it would help to talk directly to Dr. _____, I will have him call you.”

[Pause for a response.]

“It really was a pleasure speaking with you. I hope to hear from you again. Thank you.”

TIPS AND NOTES

- Give them your name.
- Tell the caller that if they have any questions, they are welcome to call you back.

Also say:

- You will be pleased to answer their questions.
- You look forward to meeting them when they come in.
- You will personally introduce them to the other members of the practice team.
- Thank the caller again for scheduling the appointment.

- If the caller isn’t ready to book an appointment, don’t say anything the caller might interpret as pressure.
- Leave the door open for future communications. Leave a good impression.
- Don’t assume this caller will never make an appointment.
- Make sure you have the caller’s full name and contact information.
- In a day or two, follow up with a call to check back with them.

How the right software can help increase new-patient bookings

These ideas will help get your practice started on the path toward converting more callers into new patients.

As you begin counting inbound phone calls and calculating your conversion rates, you may find that manual methods are more time-consuming and inaccurate than you would like.

That's why Patient Prism has developed software, training, and consulting services to help you turn more callers into new patients.

Patient Prism's software does all these things:

- It tracks the number of inbound calls from new patients.
- It reports the value of opportunities your office as lost, based on your fee schedule. For example, if a caller has said he needs three implants and your office charges \$5,000 per implant, the system will record that you've lost \$15,000 if the caller doesn't book an appointment.
- It records phone calls and provides a fast visual summary of where the calls could be improved.
- It provides timely alerts when you should call people back to try again to book an appointment you've lost.

In addition, Patient Prism's software provides help in managing your front-office staff:

- It measures the effectiveness of individual staff members. Or, if you use a call center, it tracks the effectiveness of individual agents at the call center.
- It helps you schedule enough staff to handle heavy call volume during peak hours.
- It provides coaching and training to your staff.

Finally, the software measures the effectiveness of each marketing channel and tactic.

What to do next

- 1 Visit **PatientPrism.com** to download Patient Prism's free document, "Dental Practice Guide to Winning New Patients on the Telephone: Ideas for Owners and Leaders."
- 2 For ideas on how to reduce waste in your marketing investments, practice owners and business managers will also want to **download** the free document "Dental Marketing: How to Stop Wasting 30% to 80% of Your Marketing Budget."
- 3 Start a conversation and **request a Patient Prism demo**.
- 4 For more about Patient Prism, please visit **PatientPrism.com**.



About Robin Morrison

Robin Morrison's passion for dentistry and health care, combined with her entrepreneurial spirit, led her to found two successful companies. Her passion for dentistry and health care, combined with her entrepreneurial spirit, led her to found two successful companies. She is president of RLM Healthcare Marketing & Consulting, Inc., founded in 1997, and Dental Consultant Connection, founded in 2011.

Robin began her career in dentistry in 1981, working in an exceptional dental practice as an office administrator and marketing director.

In 2012, Robin teamed up with Linda Miles to form Oral Cancer Cause, Inc. (OCC), a 501(c)3 non-profit corporation. As founders of OCC and partners in additional dental projects, Robin and Linda have worked tirelessly to form an organization that financially assists oral cancer patients and their families, while creating awareness about oral cancer. About



Debbie Bush

Debbie Bush is the content director for Patient Prism Academy. She has also served as managing editor for Dentist Profit Systems.

Debbie was Director of Marketing and Communications at The Pankey Institute for Advanced Dental Education from 1997 to 2003. Since then, she was a consulting content strategist, writer, and editor on many projects for The Pankey Institute, Sclar Center for Empowered Dental Implant Learning, Irwin Becker Initiatives, and The Academy of Dental Leadership. She has also consulted with more than 300 general dentists, dental specialists, and health care educators.

Debbie is proud of her contributions to several books:

- *The Exceptional Dental Practice: Why Good Enough Isn't Good Enough*
- *The Art of the Examination: Why Patient Care Goes Beyond Clinical Correctness*
- *The Art of Case Presentation: An Approach to Successful Dental Practice*
- *Comprehensive Occlusal Concepts in Clinical Practice*
- *Digital Dental Photography*
- *A Lighter Side to Cancer: From Wake-up Call to Radiant Wellness.*

Before working in dentistry, Debbie was a writer and publications manager for software development and marketing teams at ADP Network Services, Citibank, Ford Motor Corporation, and CS Thomson Reuters.

About Patient Prism

Since the early 2000s, Patient Prism's founders have worked with hundreds of dental practices. They started in the role of certified public accountants. As CPAs, they prepared the books of diverse practices.

That experience helped them see the differences between thriving practices and others whose growth had stalled.

They saw how fast patient attrition can cause a practice to shrink. It happens unless the practice constantly invests in marketing to win new patients.

For several years, Patient Prism's founders offered marketing services to dental practices. They built and

managed websites. They ran pay-per-click ad campaigns.

From that experience, they learned which marketing investments consistently deliver high returns.

More important, they saw how many practices waste money on marketing. To their surprise, they noted that many practices waste a lot of money even on tactics that generate plenty of new-patient inquiries.

Although the phone rings often in these practices, inbound calls don't bring in as many new patients as they could.

The waste occurs when dental practices don't monitor how

effectively their front-office staff manages incoming phone calls.

With that insight, they switched their focus to helping dentists manage calls from potential new patients.

Working with dentists, they developed and patented technologies to measure key marketing performance metrics.

Today, Patient Prism's software shows which marketing investments generate the highest-value phone calls from potential new patients. The technology also enables busy practices to convert more of these callers into patients.

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We bridge the gap between your dental marketing and patient conversion.