The Smile-Vision Multi-Step Case Acceptance Routine

Follow the steps below for predictable case acceptance! Print this document, and keep it as a guide for presenting to all new patients coming to your office from advertising.

1. The new-patient phone call:

a) The outcome of the first phone call should ALWAYS result in an office visit to determine the direction of treatment.
b) Make the first visit short and at low cost unless the patient wants it otherwise.
c) Emergency patients should be scheduled at the designated "emergency time" ASAP. Never work them into treatment schedule!
d) Never give fees or diagnose problems over the phone.
e) Get the patient's address, email and cell number & send practice info documents and a greeting.

2. The free or low cost first visit:

a) A team member sits down with new patients in a private area to complete a history asking questions and gathering info about the direction of treatment the patient expects.
b) Patients needing or wanting routine care should schedule a routine exam appointment.
c) Candidates for more extensive care should be routed to a more complete oral physical (COF).
d) For all cases where the smile aesthetics play a roll take a full-face photo and send it to Smile-Vision for a full-face digital smile simulation.

3. The Complete Oral Physical visit:

a) Those who are interested and are anxious to learn more will pay. Those who are not ready to move forward will refuse the more complete exam but may accept the routine care route. **This is an important screening step**.
b) Use this visit to obtain both clinical and non-clinical info that will help when creating an appropriate written treatment plan.
c) Show and discuss the simulation with the patient. Give them prints to take home.
d) Use this opportunity to "frame the fees" so

4. Preparation for the consult

a) Schedule a separate appointment for the consult.
b) Request that the patient's spouse or financial proxy be present for that visit.
c) Prepare a **written treatment plan** with easy-to-understand pictures (the simulation included).
d) Offer 3 options whenever possible.
e) Have fees and visits pre-planned for each option.

5. The consult

a) Have 4 People in the room: Doctor, patient, proxy and financial coordinator.
b) Doctor-dress in a blue suit. Financial coordinator well groomed.
c) Doctor presents the written plan (not to exceed 20 Min.).
d) Verify that the patient understands each option by asking "Is that clear to you?".

e) The doctor leaves the room when all questions are answered and the patient has chosen one of the options.
f) The financial coordinator makes arrangements for payment and schedules the next appointment.

6. Post-consult steps when patients don't move forward at the consult:

a) Setup a Question & Answer Session to resolve any open questions.
b) Send periodic messages to clients via email and snail mail to remind them that you are still there and waiting for a decision.
c) Mention the open treatment options at subsequent routine visits and show the smile simulation.
d) Continue with routine care as usual.

Follow this outline carefully and it will soon become an ingrained routine upon which your office will build!

I invite you to contact me with questions or to discuss the Smile-Vision process in more detail.

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