

Gold Standard Dentist Handover

As a PC you should not accept anything less

5-Step Process - TTSA

Step 1) 1x Patient **Treatment plan** uploaded in Core/ Principle (all treatments and total displaying)

Step 2) Tiering cross checked - if patient tx plan and tier (1/2/3) matches

Step 3) Are **Scans** being taken now? How committed is this patient to tx?

Step 4) Will there be an **Account** for today? If so how much?

Step 5) What **Appt time** did Dentist propose in the room?

If any of this is not completed = Dentist to go back and find out in room with pt- eg do not present a plan that is not tiered correctly

| TIER | TYPICAL OCCUPATIONS | TREATMENT PLAN MAX AMOUNT | SUITABLE TREATMENT OPTIONS (FOR MOST CHANCE OF FINANCE APPROVAL) |
|---|--|---|--|
| Tier 1 \$40K- 60K SALARY | <ul style="list-style-type: none"> - Retail workers - Hospitality workers - Casual Labourers - Early Childhood workers - Students/ University students - Customer service/ office/ administration | \$12k (ideally keep under \$10k) budget | <ul style="list-style-type: none"> - DBc packages (pending how many teeth concerns patient) - Invisalign treatment (if patient main concern is alignment and pt is happy to complete treatment over longer period of time) - DB4 package - DB4 + CV combination |
| Tier 2 \$60K - 100K SALARY | <ul style="list-style-type: none"> - Trade workers - Carpenters, Tilers, Builders etc - Teachers - Nurses/ Mid-wives - Police/ Ambulance/ Fire services - Farmers - PA/ EA/ Office coordinators - Project Managers - Real Estate Agents - Finance/ Insurance services - Marketing services | \$10k - 15k budget | <ul style="list-style-type: none"> - DBc packages (pending how many teeth concerns patient) - Invisalign treatment (if patient main concern is alignment and pt is happy to complete treatment over longer period of time) - DB4/ DB6 package - DB4/DB6 + CV combination |
| Tier 3 \$100K+ SALARY | <ul style="list-style-type: none"> - IT software roles - Accountants - Lawyers - Doctors/ Surgeons - Engineers - Managers (in general - eg CEO, CFO/ COO) | \$15-20k budget | <ul style="list-style-type: none"> - DB6/ DB8/ DB10 packages - Invisalign treatment (if patient main concern is alignment and pt is happy to complete treatment over longer period of time) |

PC Consult with Patient

Consult Workflow:

- How is your day going?
 - Is today your day off?
What are you doing after your consult? Any plans? (confirms tiering)
 - Thank you so much for coming in today. BTW How did you find out about us?
 - Are you excited to get started?
 - What treatment did Dr X discuss with you today and is that a treatment you were expecting or looking for coming into today? + add POD here
 - Did Dr X give you a ball park figure on how much the treatment may cost as you discussed?
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- Payment options discussion
 - Appointments booked

PC Strategy on the day/ After the Day Tool Box

| On the Day | After the Day |
|--|--|
| <ul style="list-style-type: none"> - Optimal Handover from Dentist and PCs | <ul style="list-style-type: none"> - Set a follow up task day after patient consult to follow up with pts |
| <ul style="list-style-type: none"> - Tiering patients/ budget - is the patient's tier correct? If not ask Dentist to reconsult on the day to fit within pt budget | <ul style="list-style-type: none"> - Ask the Dentist to complete a follow up/ check in call with patient post dentist/pc consult few days after consult (set a task and f/u with Dentist outcome) |
| <ul style="list-style-type: none"> - Offer Case Study to pt (can be after the day also) | <ul style="list-style-type: none"> - Offer Case Study to pt |
| <ul style="list-style-type: none"> - Ensure all finance options are explored | <ul style="list-style-type: none"> - Dentist/ PC Meetings - 30 mins per week to catch up on cases not closed |
| <ul style="list-style-type: none"> - If patient is using a family member/ friend for separate application or applying super release, apply on the spot. Ask pt to call family member/ friend to collect details for payment plan approval or call Super hotline to lodge the application on the day of consult. | <ul style="list-style-type: none"> - Offer the patient a different Dentist if Dentist is the issue within the clinic |
| <ul style="list-style-type: none"> - Using Dentists B/ AS / IG page showing clinician work DB SMILES PAGE | |

CASE STUDY PARAMETERS

| Payment Type | Discount Offering | T&Cs |
|--|---|--|
| Upfront Payment Super Release | 20% discount MAX *If you need higher discount this needs to be approved by Sophie/ Annalise | Commit to before and afters to be posted online (Teeth only) Date to commit by - Case study fee applies for X date only (i.e. April only) |
| Payment Plan (Humm / Payright/ TLC / Pretty Penny) | 15% discount MAX (AOI ONLY) No 48 Months *No further discount as we need to factor in merchant fees | Commit to before and afters to be posted online (Teeth only) Date to commit by - Case study fee applies for X date only (i.e. April only) |

CASE STUDY

Case Study Word Tracks & Parameters

“[the reason for the call actually is that I am calling not only for feedback]- however because Dr [Xdentist name] has put your name forward as potential case study case for our clinic. She/ he knew how excited you were to get started with your treatment and thought of you for this opportunity. We have just hired a Dentist for our clinic [Dr Y] and before she/he can practice on their own, she/he needs to complete some case studies. [Dr Y] is not knew to dentistry, however she is new to Dental Boutique and needs to learn our techniques and the Dental Boutique way. Dr [X] as one of our clinic’s most senior dentists, is overlooking [Dr Y] and what this program involves is a discount for being a part of this case study program and also your consent to before/ afters to be posted on social media. The discount is 15% to participate in this program- I can see you were looking at our 8x veneer package at \$19987?

This would bring the cost down to \$16988 (essentially you would getting 8x teeth for the price of 6x teeth), total discount is almost \$3k.

[If they say they would prefer super release or upfront payment options then can offer 20%] and let them know what discount will be/ total price

How does this sound to you?

a) If pt happy to proceed - then complete payment plan application/ progress with payment options + book next appointments

b) If pt would like to think about the offer - **send summary email outlining all details of discussion** + set FU2 task for 2-3 days later to check in once they have had a chance to review email/ sit on info, set a time with patient of when you will touch base again - Eg after the weekend (Monday date./time)

Also let the patient know, we are hoping to have a few patients by (date - end of following week/ month) so if they can let you know before then that would be great so you can add them to the list as we are only looking for 3-4 patients. Dentist Y will need some case studies by this time so we can prepare the case study training by the end of this month/ organise finance and appointments.

KEY TAKEAWAYS

- **PC HANDOVER**
- **CONSULT WORKFLOW**
- **STRATEGIES**

1. *Get creative on the day of consult to lock patient in - do not let patient go so easily. Think of strategy AND back up strategy if first strategy is not successful.
Low close rate after pt leaves consult: 30%*
2. *PC Dentist handover - 5x Gold standard steps to ensure you are getting all information for a successful PC consult*
3. *Ask tx plan/ budget question (2x questions) in consult workflow before proceeding to payment options/appts - to ensure patient is happy with plan and budget/ fully understands the commitment*

Finance Options

PC - Payment Guideline at Dental Boutique (AUS)

| Amount | Upfront Payment | Afterpay | Payright | Humm | TLC | Super | Combination Options |
|----------------------|-----------------|-------------------------|----------|------|-----|-------|--|
| \$0 - \$1000 | ✓ | ✓ | | | | | Upfront and afterpay |
| \$1,000 \$10,000 | ✓ | ✓ <i>*Up to \$3k</i> | ✓ | ✓ | ✓ | ✓ | Afterpay up to \$3k, upfront and payright/humm Part upfront, payright/humm Part upfront/ super Humm or Payright/super |
| \$10,000 \$20,000 | ✓ | | | ✓ | ✓ | ✓ | Part upfront, payright/humm Part upfront/ super |
| \$20,000 | ✓ | | | ✓ | ✓ | ✓ | Upfront and Humm/Payright Upfront/Super Upfront/super/humm or payright |

Objection Arises

An objection is better than a flat “NO”, so when you get one reply with a “Thankyou”. This acknowledges the patients concerns building trust and rapport, while opening the door to additional conversation about their needs and pain points. Keep it simple, like: “I really appreciate you sharing that with me”

Empathise Objection

Validate their objection, like: “I hear what you are saying and I can help...” By empathizing with the patient they are more likely to open up and share information that can help frame a valuable treatment plan.

Uncover The Root Cause Of The Object

Don't ask yes/no questions - you want the patient to share as much information as possible and one worded answers won't give you much to work with. If the objection was “This isn't in my budget” you might ask “What do you mean specifically, what does your budget look?”

You want to make sure that overcome this objection when the patient is in the consulting room with you - not once they leave. This can be as simple as “Aside from Budget, is there anything else that could be holding you back from proceeding with this treatment plan”

Reframe The Value

Once you've overcome the objection, you then want to clarify the value of the smile journey and treatment plan with the patient. This looks like: “After Dr X discussed your treatment plan what are you most excited about for starting treatment with us”

Let the patient do the talking about what they're most excited about this will help reframe their mind.

Once the patient has framed their value of their smile journey / treatment plan, tie it together with the Dental Boutique PODs, show some B&As to really get the patient excited and motivated.

Close The Deal

Finance

Payment Plan
Upfront Payment - Take 20 to 50% dependant on procedure

Appointments Booked

Book next available appointment

Summary Email

Send summary to patient and attach marketing documents relating to treatment plan

COMMON OBJECTIONS

Finance - “I don’t have the budget for this....”

Insufficient Buy In - “I need to check with my husband (decision maker)”

Competitor - “Dr X can do this for a cheaper price”

Bad Timing - “I’m going on a holiday, this isn’t a priority right now”

Finance
"I dont have the budget"

1. Find out patients budget

This may be total value of plan and/or weekly repayment break down

2. If treatment plan presented doesn't match this - go speak to the dentist about this to review plan and come back in and speak to the patient

Tip:

1. if the treatment plan is a staged plan i.e. Invisalign then composite bonding and the patient can't afford total amount but could afford the treatment plan split
2. Offer case study

Insufficient Buy In
"I need to check with my husband"

1. Does your partner know you are here today for a consult
 - A. Don't know about consult - are they hiding this from partner? May not be supportive.
 - B. If they do know, likely to be supportive
2. Provide all information include marketing for B&As
3. Touch base next business day - find out best time to call pt - can even organise a google meet or phone call with partner involved if needed

Competitor
"Dr X does veneers for \$500 per tooth"

1. Find out if they have been for a consult?
 - A. Yes to consult, then ask if they have a treatment plan you can review to compare against
 - B. No to consult, encourage to go for consult to compare treatment plans - at this stage provide PODs and questions to ask about there packages in consult to compare. Always encourage to send through to you after consult so we can review and if required against our plan to help close for pt.
2. If going for a consult, find out when they are going and set up a time to follow up before consult and offer case study and/or discount

Bad Timing
"I'm going on holidays so will look at starting after"

1. Find out when there holiday is if 3+ weeks away try and encourage to close the deal to have new smile before they go away
 2. If holiday is under 3 weeks away find out when they're back and set up a time to call them to re-discuss
- Could even encourage books are really full for the next X months, would you like to pay a 20% deposit to secure a booking for when you're back and we can arrange rest of finance when you return