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# When Dentists want Results

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## Chart Audits



### ***Mining for Gold in the Dental Office***

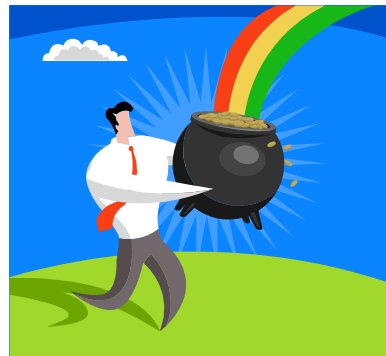
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# ***Chart Audit CPR***

Most dental offices have a “gold mine” of new patients just waiting to be asked to come in. The source of this gold mine is in your office right now, in the form of people that have been patients previously and for one reason or another are not currently active. If you take the time to “mine” that gold effectively your effort will be richly rewarded.

THE KEY element in the process is for you and whoever will be working with you to be clear, down to your toes, that it is in the patients BEST INTEREST to be seeing a dentist on a regular basis, and that you are providing a needed service by contacting them. It just so happens that having them come back to your practice is good for your practice as well. As soon as you begin to think your job is to sell them on keeping their oral health up you are missing the point. They are people you are calling a providing a service to, and you want to do it with love and affinity.



## **Getting Ready**

Sort your patient charts by people who have been in the office in the last 18 months and people who have not been seen in the office for the same period. Assign letters of the alphabet to team members (A to F to Jean, G to M to Mary, etc.).

Go through each letter and differentiate between patients who have a positive history with the practice and just haven't been in, and those who had broken appointments, chronically late, etc. (turkeys). File the charts to inactivate in the designated place.

Contact the charts selected using the script below. If phone numbers have changed – research the phone number – through directory assistance. If no phone number, inactivate the chart.

## **NOW WE ARE READY TO MAKE CALLS!**

Start with the alphabetical list in the computer, or go chart by chart starting with the A's and the most active charts.

# ***Chart Audit CPR***

CPR protocol

- Determine how you will document in the computer- perhaps an asterisk when they contacted.
- Update any information for the patient that is not correct in the computer. Don't forget to get their email address!
- Depending on your situation, plan to spend 2-4 hours a day on this project.
- After we finish the active patients we will start the inactive list.

## **Tracking:**

Keep good track of your effectiveness. If there are several of you participating, create a silly competition. Perhaps the most effective gets taken to lunch at the end of the month. Or the least effective has to wear a silly hat. Have fun!

Keep track of:

- How many calls placed?
- How many patients actually contacted
- How many scheduled- \$ TX scheduled.

Goal is 2 patients scheduled per hour

Update the office progress every week.

## **The Phone Call**

Make it your own so it sounds real and caring. Remember 93% of your conversation is non-verbal. Keep in mind that you are building relationships, not just production. I have found it useful to keep a small mirror next to me that I look at to remind myself to smile.

The script below is a suggested one that we know works. I suggest you practice it with each other (do mock calls) until you are comfortable with it. Do not practice on patients!

Research the charts first. Discuss with other team members. Prepare by looking at the history and existing treatment plan and know as much as possible before you call them. Be prepared to speak about something that is particular to that patient. Be warm, happy, positive and caring.



# Chart Audit CPR

## Suggested Script

- Hello! This is \_\_\_\_\_ from Dr. \_\_\_\_\_ office. Do you have a few minutes to talk?
- How have you been, we've missed you. Dr. Smile asked me to call. Is everything OK?
- Did you know it's been a \_\_\_\_\_ years since you've seen Dr. \_\_\_\_\_?
- I apologize for taking so long to get in touch with you.
- I know you really care about your dental health and looking at your chart, last time you were here there was infection in your gums. Is that still going on? (Talk about the conditions in their mouth NOT treatment.)

Assume they have not received the recall cards from your office.

- Doesn't it make sense that we get you in as soon as possible?

If they are seeing another Dentist ask them if they are happy there? They are always welcome to return to the practice at any time if they are not getting the treatment they **DESERVE**. (Key word)

*You may want to ask if there was something you or the team did to cause them to leave. Would you mind sharing with us so we do not repeat that for another patient?*

**DOCUMENT the conversation in the chart and/or the computer.**

## Other Potential Responses

Seeing another dentist: Oh – well I'm glad to hear you're seeing someone. Are they taking good care of you? – You know the door is always open. Can you help me – is there anything we did that made you feel uncomfortable and choose another dentist??

Fees too high : Well I understand we aren't the cheapest place in town but we strive to be the best. Is it a matter establishing payments that fit your family budget? We know that dentistry can be an investment, that's why Dr. B has put in place some special financing programs to help our patients have their treatment done now and then pay it out over time. Would that work for you?

Not on my plan : Well I understand – utilizing your insurance is important to everyone. Did you know on most plans we can file for you and have the benefit come to you? That's called an out of network provider. Would you like to do that?

I don't really have time right now: In the chart identify a need. Well Dr. B is concerned about the cracked tooth on the lower left. Is that hurting yet? In any event, I'm sure you would want to get your breath freshened and teeth cleaned at least twice a year – doesn't that make sense. If they balk again: "Is there any other concern you have about coming in? "May I follow up in a month? If you follow up in a month make sure you have a system set up to keep your word.

I only want to come in if I have a problem: Oh, I see. You know in Dr. B's practice we are committed to preventative dentistry and helping people have as healthy a mouth as possible. We really don't see people on an emergency basis unless they are a regular patient of ours. It sounds like you might be happier in another practice where you can go only when you need to. When you decide where you are going – let us know and we will transfer your records.

## ***Chart Audit CPR***

Suzanne Black, her partner Mike Black plus their team of Top Results Coaches will transform your approach to Communications, Management and Marketing. With their 23 year track record they have helped dental practices, medical practices and over 30 different other industries achieve success.

They know that the Key to Results is clear, complete, compelling communication, leadership and management. They work with teams all across the United States and Canada to implement their proven systems for communication, practice management and marketing. Clients report increases in productivity, collection, increased recare effectiveness and most of all — quality of life.

With a history of making a difference in people's lives coupled with strong, effective communication training and management structures...C3's clients soar.



**C3ResultsGroup**  
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*"Dedicated to empowering clear, complete and compelling marketing systems, team communication and client/patient relationships in professional practices so they grow, prosper and fulfill the Leaders' Vision."*

### **Communication • Management • Marketing**

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