



A New Approach to Ortho Case Presentation

by **Dr. Roger P. Levin**

Like many businesses, orthodontic practices have been adversely affected by the recession. There are still a large number of practices that have been challenged to reach their production numbers for three years. This lack of growth is due to the absence in many ortho practices of what Levin Group calls post-recession systems and marketing programs.

One of the major steps Levin Group has taken to ensure that client practices continue to grow is the creation of the 5 Stages of Closing™—a new post-recession case presentation system for ortho treatment coordinators (OTCs). This step-by-step process has been extremely effective for OTCs who use it to close more than 90% of new parents and patients during treatment consultations.

Understanding The Change in Consumer Psychology

The 5 Stages of Closing™ was developed in response to a change in consumer psychology. According to a recent study in the Wall Street Journal¹, consumers with household incomes of \$200,000-\$250,000 per year have dramatically changed their decision-making process when making a purchase. These individuals now focus on three key questions before making a purchase:

- Do I really want it?
- Do I want it now?
- Do I want to buy it here?

In this economy, consumers of all income levels who once made impulsive buying decisions are now concentrating on these three questions and often postponing purchasing decisions, waiting for better deals or deciding to buy somewhere else. This mentality has made new patient ortho consults much more challenging.

The 5 Stages Of Closing™

After extensive testing, The 5 Stages Of Closing™ has proven to be one of the best new approaches to increasing ortho starts. This revolutionary new case

presentation method comprises the following steps:

1. Awareness
2. Interest
3. Seriousness
4. Conditions
5. Closing

These five stages create a new approach to understanding orthodontic case presentation. Each stage has three components. Parents and adult patients who receive a case presentation can now be scored against the five stages. Each stage represents a critical aspect of achieving case acceptance and increasing practice production. For the first time, ortho practices have the opportunity to operate at a more sophisticated level by understanding exactly what steps are needed to move a patient (and parent) to Stage 5. It is also important to note that skipping a step significantly raises the risk of case rejection.

Stage 1 — Awareness

Awareness is always the first step. Only when patients are aware of the practice's orthodontic services can they accept treatment. Creating awareness requires the efforts of everyone on the team.

Marketing

Awareness is generated through the ortho practice's internal and referral marketing programs. Patients are referred by other patients or their general practitioners. Strong marketing programs and sound referral relationships with your general practitioners ensure a steady stream of new patient consults.

The New Patient Experience

The New Patient Experience starts with a patient, parent, or referring office calling your practice. The team uses

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¹Wall Street Journal, May 12, 2011: <http://online.wsj.com/article/SB10001424052748703730804576317202215630540.html>

Value Creation Scripting™ to build confidence for the practice. This approach includes customized language that focuses on attributes of the practice, transfer of trust to the doctor, and a review of services. The target is to have 98% of all callers schedule appointments.

The New Patient Consult

When patients and parents present to the office, it will be the first direct opportunity to impress them. They will often judge the ortho practice more by the level of customer service they receive and the initial impression the practice makes rather than an explanation of a highly clinical treatment plan.

Stage 2 — Interest

Some orthodontists and OTCs assume that parents and patients will automatically move from Stage 2 – Interest right to Stage 5 – Closing. In the new economy, this does not work. Remember, the way people make their purchasing decisions has changed.

Diagnosis

Diagnosis is no longer simply about finding out what the patient needs clinically. It now must be an interactive experience where the patient is involved along with the doctor. When the clinical diagnosis begins, parents and patients must feel like they are part of the process—not just a set of teeth. This builds their interest and begins to establish stronger affinity for the practice.

Education

The OTC should be positive and informative so that the patient and parent develop a full understanding of the diagnostic findings before a benefit-focused treatment recommendation is given. Patients and parents are delighted when they are included in the conversation, fully understand the situation and feel positively about the orthodontist and staff.

Services

Today, there are often a variety of options for orthodontic treatment. Educating patients and parents about different options empowers them to make the best decision for treatment. This kind of open and transparent approach will keep them fully involved and informed during the entire course of ortho treatment.

Stage 3 — Seriousness

One of the major errors that orthodontists and treatment coordinators are making today is mistaking Stage 2 — Interest for Stage 3 — Seriousness. In the past, patients could move from Stage 2 directly to Stage 5 due to the more impulsive decision-making environment at the time.

Ortho practices today that attempt to move patients directly from Stage 2 to Stage 5 will find many treatment plans rejected or indefinitely put off because patients and parents are not yet serious about making a decision to have treatment.

Frequently Asked Questions (FAQs)

Whenever information is provided to patients and parents, there will be questions. They want to understand why treatment is being recommended. Unlike in the past, parents and patients have become more hesitant about whether they will accept treatment. As questions are answered, patients can move forward onto the next stage of closing.

Objections

Many orthodontists and OTCs react negatively and defensively to objections, feeling that their expertise is being questioned. In truth, objections are normal. I have repeatedly stated in seminars that objections are part of closing the case. Parents and patients are basically saying, “If you answer my objections properly, I am very serious about having treatment.”

Should-Have-Asked Questions (SAQs)

These are questions that parents and patients did not ask, but if they had, they would have been more likely to accept treatment. Many orthodontists have told me how they have been fooled into thinking that the case was closed only to find out this wasn't true. To keep such a situation from happening, ortho practices can say, “One question you might want to know the answer to is...” When making an important decision, people greatly appreciate being given information about “things that they don't know but should know and be asking about.” This builds trust instantly and dramatically.

Stage 4 — Conditions

This stage is probably the most important. Consumers and patients today are very concerned about how much they are spending, how they are spending it, and when they spend it. If Stage 4 is not properly handled, patients will reject the case presentation.

Financial Arrangements

It is important to present several options and allow parents and patients to decide which one is in their best interest. Due to the increasing numbers of parents and patients who can't afford to pay out-of-pocket, the practice should offer patient financing as an option.

Scheduling

Once parents and patients have selected a financial

option, use Value Creation Scripting™ to select a mutually agreeable appointment to begin treatment. Effective scripting emphasizes patient convenience, while allowing the practice to maximize its schedule.

Logistics

This step covers the length of treatment, any potential discomfort, and how many appointments are required to complete treatment. These details will obviously be of great interest to parents and patients.

Stage 5 — Closing

If the first four stages and all of the factors are properly covered, then the patient is essentially closed. It would be rare for parents and patients who have reached this stage to change their mind. In fact, the show rate for the first appointment following The 5 Stages Of Closing™ is extremely high.

Scheduled

Note that the first factor here is not “scheduling”, but “scheduled”. The patient has made an appointment to have treatment. Since The 5 Stages Of Closing™ is not about hard selling, but a cooperative process of determining the treatment plan and gaining acceptance, patients are unlikely to change their minds at this stage.

Down Payment

Most ortho practices still require a 20–25% down payment prior to treatment. In light of the recent recession, many people are hard-pressed to come up with that amount of money. Offering patient financing with a variety of down payment options will help ortho practices motivate more

parents and patients to say “yes” to treatment.

Present for Treatment

Here’s the ultimate proof that the patient will follow through with treatment recommendations. While scheduling and deposits are reassuring, the patient actually showing up for treatment is the true mark of success. If there are concerns about a patient following through, the ortho practice should confirm the appointment with patients and parents via their cell phone. Use this call as an opportunity to reinforce the value of treatment and create new excitement for the patient.

The 5 Stages Of Closing™ is an extremely effective method to help practices understand patient psychology, which stage the patient is in, and how to achieve the Levin Group target of starting 90% of all cases. Any OTC following this protocol will dramatically improve their close rates. Start using The 5 Stages Of Closing™ today and watch your ortho practice be transformed! ♦

About the Author



Dr. Roger P. Levin is Chairman and CEO of Levin Group, Inc. Levin Group provides premier, comprehensive consulting solutions that deliver Total Ortho Success™ to orthodontists in the U.S. and around the world.