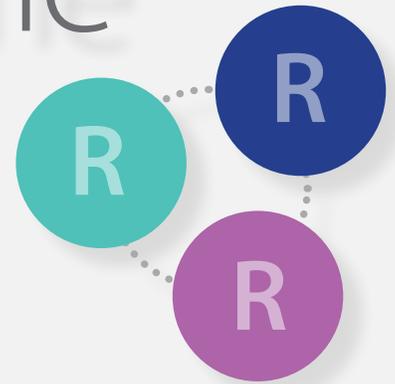


It's Time for Some R and R and R



BY SANDY PARDUE

Success lies in the combination of being able to attract new patients and convert them into long-term, loyal dental advocates. I believe all practices already have the resources and patients they need to grow – from within. They just need time for a little R and R and R – **Retention, Recall** and **Reactivation**.

The Most Important R: **Retention**

Wouldn't it be nice if dental practices were filled with patients who can't wait for their next appointment? In reality, to improve patient retention, teams should start by adding more value to visits and improving patient education. Work on building stronger relationships with patients. Communicate on a consistent basis, and be interested in them as humans first, patients second. And of course, take the time to educate them. The public, in general, may have a very low dental IQ, especially when it comes to the value of hygiene and the role of dental insurance benefits. It makes our

jobs challenging, but we must educate patients and add value to their lives every single time they come into the practice.

Retaining patients is all about building good patient relationships. Because patients are most likely to visit the practice at most two times a year, building relationships takes a bit more work. Here are a few ideas:

— **Send handwritten notes** to overdue patients. Let patients know you miss seeing them. Have each person in the practice send at least five cards a week to patients.

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■ **Send a package** with a toothbrush and floss (I guarantee they will open it).

■ **Send birthday, anniversary, holiday, congratulations** and other thoughtful cards.

■ **Use email** to send patients seasonal communications. Some great topics to consider are “Spring Cleaning,” “Get Ready for Back-to-School,” and “Fall Use It or Lose It” reminding them of their dental insurance benefits.

■ **Place a phone call** reminding them of incomplete dentistry. If cost was a barrier to care, it would be important to review payment options with them, including a financing option through a third-party company.

The key is to be proactive, timely and consistent. These activities take a little time but truly have a big impact on patient retention.

Hygiene’s Favorite R: **Recall**

Most practices may not be doing enough to keep patients coming back. One major problem may be the lack of a true, proven recall process. There are two rules to an effective recall system. First, every patient should leave the practice with a future recall date or a future appointment. Second, be consistent and predictable. When dental teams implement a recall system, it’s best to put it in writing so that it can be followed exactly, month after month. Only consistency brings predictable results.

There are ways to structure an effective recall system:

- 1. Find a recall card** that is professional looking and represents the office well.
- 2.** For patients that pre-scheduled their appointment, **send the card out on a designated day** each week for patients scheduled three weeks away. Include the appointment date and time and let patients know that if they need to change the appointment, the practice requires advanced notice, since the time has been reserved for them.

For example:

"We are confirming your appointment. If you are unable to keep this appointment, please call the office at (phone number with area code) as soon as possible so that the time reserved can be utilized."

3. Send a **reminder text** three days prior to the appointment.

4. If the patient did not confirm from the text, **call the patient one day prior to the appointment.** It's important to have human-to-human contact because the patient's tone of voice and reaction are key. Avoid sending several texts and emails in a short period in regards to one appointment.

For patients without an appointment that are due for recall, send out a recall card, but start the first paragraph with, *"We are letting you know that it is time for your dental check-up."*

Production's Favorite R: **Reactivation**

Practices typically start thinking about reactivation when they are desperate for patients. Reactivation should be a focus each January. Here's the process:

Step 1:

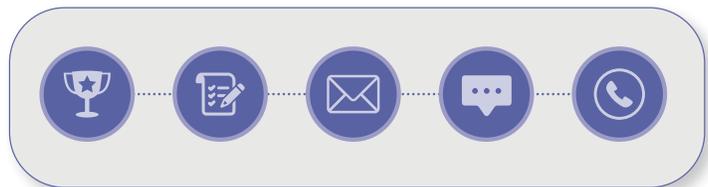
Assign a champion. This project is too valuable to the practice not to have someone accountable for its completion.

Step 2:

Print a list of patients that have not been in for six months. Go back at least three years.

Step 3:

Mail a recall card to them - not a letter but a postcard. It should stand out in the mail. Put "Return Service Requested" on the card under the return address, so that any undeliverable cards are returned to the practice with the new address. If Mrs. Jones moved out of state, she will probably not need to be contacted again.



Step 4:

Include the following message:

“Dear (name): We miss seeing you in our office. As you know, when dental decay, gingivitis, periodontal disease or other complications are discovered in early stages, treatment is not complicated and costs are less. Please phone the office at (insert phone number including area code) for a convenient appointment.”

Step 5:

Mail the same card to the same group of people two to three months in a row.

Step 6:

Add a personal phone call. Nothing replaces human contact.

“Mrs. Jones, this is Susan from Dr. Smith’s office. He’s concerned you’re overdue for your hygiene appointment and oral cancer prevention screening and he asked me to call you. It’s been more than a year since we’ve seen you. We have an appointment available next Tuesday at 9 am or Wednesday at 4 pm. Which would work better for you?”

All three Rs - **retention, recall** and **reactivation** - work together to resolve the “revolving door” issue. And the net result is a busy, thriving practice providing a valuable service to healthy and happy patients who, although dentistry might not be their number one priority, do value dentistry.



Sandy Pardue is Director of Consulting with Classic Practice Resources and is an internationally recognized lecturer, author and practice management consultant. Ms. Pardue was named a “Leader in Consulting” by *Dentistry Today* for fourteen consecutive years. With over 30 years of practical experience in the dental field, Ms. Pardue has assisted dental teams with practice expansion and staff development and is known for her comprehensive approach to office systems, focusing on increasing efficiency and production. In addition to one-on-one team consulting, Ms. Pardue is a headline speaker and provides hands-on workshops on a variety of key processes including scheduling, accounts receivable and patient retention.

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