



# *five* IS *of the* INITIAL EXAM

MEMBER ARTICLE | BY LORA GRAETZER, MAADOM, DISIPC

How are we presenting our team to new patients? Are the patients receiving the message of who we are, why we care, and how we care for them? Because it can be hard to see our practice objectively, here are some tips to ensure our message is clear and received.

Initial visits are introductions of the practice to the patient, and making a lasting impression is imperative. When patients are dazzled with the level of care, professionalism, and attention they receive, they refer their friends, family, and colleagues for the same first-class treatment, and the practice grows and thrives!

Utilize the five "Is" to begin your new relationships and attract the best patients to your practice.

## **IMPRESSION**

This is where we can relay who we are and why we care about them as a practice. Impressions are gathered from online reviews, social media sites, and their first phone call before the patient's in-person visit.

Introduce online visitors with a virtual office tour hosted by the administrative team.

- The doctor can give a synopsis of their education, career, and why they chose to be dentists. The patient should understand why the doctors care about their oral health and what to expect at their first visit.
- The clinical team can present the technologies the practice has invested in and the benefits for patient care or experience.
- The hygiene team can review what to expect at preventive care appointments and why it's essential to their overall health.

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## ...EXAM CONTINUED

- They can also introduce instruments used and any patient comfort items available. Keep each video less than 2 minutes to retain attention while educating the patient.

On the patient's first call, they want a friendly person with a warm greeting. Some phone introductions are too long and wordy, or they're an automated maze of prompts to reach a person; the "hold please" greeting is even worse. Remember that the person calling has intentionally done so and wants to talk with you. Giving them your full attention matters.

## INSURANCE

For insurance-driven patients, be transparent with them before scheduling their first visit. Explain how this affects the patient if you're in-network, out-of-network, non-participating, or fee-for-service. The patient can make an educated decision when they understand the benefits available and will appreciate the transparency and thorough explanation.

## INTRODUCTIONS

Make eye contact and smile warmly during introductions. Introduce the patient to the next team member entrusted to their care and lead with an informative tidbit. Example: "Patient, this is Team Member, and they've been our lead assistant for over 15 years and will take great care of you". On the way to their operatory, point out the nearest restroom, treatment rooms (if empty), sterilization area, and consultation room. As we walk them around, we also show the patients how we care for them by introducing them to the office's technologies to provide the best care possible.

## INTRAORAL PHOTOS

During the initial visit, we meet the patient (and their mouth) for the first time. In addition to their complete medical and dental history and quality diagnostic radiographs, intraoral photos are an excellent tool to inventory the mouth in its current condition. Photos are the best way to help the patients see their mouth the same way as the clinician. It is a good way to also document crowns with open margins, leaking fillings, receding areas, worn areas from clenching or grinding, and any items not visible on radiographs.

During the treatment presentation, have the following available to the patient:

- Printed x-rays and photos to provide evidence and understanding of the necessary treatment.
- Treatment plan
- Signed financial arrangements

## INVITE

After the dental team has made a great impression, invite the patient's family to experience the same wonderful care with a small handwritten note. The note could be as simple as: "It was wonderful meeting you, NAME! We would love to meet your family as well. Take care, and we'll see you soon!" If you have a referral program, the patient receives that bonus, too!

By the end of the patient's initial visit, your practice's message should have been delivered and received with a very clear understanding of why and how their dental team cares for their oral health. Implementing the five "Is" to begin your relationship with new patients will elevate treatment acceptance, generate personal referrals, and be the beautiful start of a long relationship. ■



## MEET THE MEMBER

Lora Graetzer, MAADOM, DISIPC was one of first 40 nationwide candidates to earn the Dental Industry Specialist in Infection Prevention and Control designation.

She earned her FAADOM in 2020 and MAADOM in 2023. Lora is also the Vice President of the AADOM's DPLN BAM Leadership League, your Maryland Dental Connection. Check out the educational opportunities that await you at [bamleadershipleague.com](http://bamleadershipleague.com)