



Practice Focus

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Series 6 The Championship Playbook

Session 8 Setting Patients up for Success by Being a Better Leader and Guide Through Enhancing Experiences, Elevating Communication and Exerting More Control (Part 2)

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Hello everyone, and thank you for prioritizing the time to meet again and continue to better your best. I know Scott gave you a lot of self-reflection to think about last month, and I hope it inspired you to continue to cultivate this growth-minded culture within your team. Not everyone meets like this and it's so great to continue to want to better your best. You've often heard us say that, that the best want to keep bettering their best. And I want to emphasize the fact that that doesn't mean more work. What that means is taking those strengths and superpowers that Scott got you talking about last month and proactively finding more opportunities to bring them out, every day in your own way, but really owning that role. And that role that we talk about and Scott mentioned this last month too, you've heard us talk about it often, guiding the patients to yes, really owning that responsibility as the patient's guide.

And I have a little silly example I wanted to share and bear with me, but it really connected with this idea. And I thought it was a beautiful example of being a patient's guide, in this case, a customer's guide, but they're our customers, so it'll all come back. But the silly example I wanted to share is, it was a really rainy day and I had this flimsy umbrella and the umbrella totally blew inside out. Useless, had to throw it out and it was really frustrating. So, I knew I had a gift card to a local store and I went in and I was looking for a new umbrella. I saw one up front and I was going to reach for it and the salesperson came up to me and he asked if there was anything he could help me find.

And so, I shared the story with him and I was already grabbing one of these umbrellas up front and he mentioned to me, and he said, "We have another option here at the back of the store. If you'd like me to show it to you, I think it might be a better option." And he brought me to the back and we looked at this umbrella and he was showing me that the handle was thicker, it was less flimsy, it wasn't like that plastic of the last umbrella I had, it doesn't blow inside out. He owned one, he'd never seen it get returned, it was something that had a warranty. And so, I had this gift card for the store, would've covered the first umbrella. This one was more of an investment. But he took the time to really show it to me and to explain how it would solve my problem, and you can see how at the end of it, it was worth it.

In my opinion, in my own brain but with his guidance, I was able to make that choice for myself. It's a perfect example of guiding the patient to yes, in this case, the customer. But you see how this is our job. Our job is to guide our patients, to remember the second umbrella. Don't get swayed by that first one, that insurance one where they tell you to just take this and go, "Nope, we've got this other option." That's us. And this is where we want to really help our patients see why moving forward, why saying yes, why really being proactive here is going to serve them better. So, a lot of you are doing this really well. And as you go through this activity, we want to of course focus on where we can get better. That is necessary in the growth journey.

But I also want you to think about, what is working and what is your superpower that's already in play and how can you do more of it? How can we bring it to life more? If we're doing it half the time or half the days, how can we do it every day? How can we bring it to life with every patient? What's that one line or that one way you guide the patients that work so well that we can do more? That's that superpower and bringing it to life. So, this is something that we're going to focus on today. And we want to be really honest with ourselves about where do we give in to the patient's excuses and where do we stop fighting for them. That's the growth opportunity here.

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So, we're going to think about ways as we go through four key areas of where can we help be the patient's conscience. It's an interesting word to think about where we're helping them see value in the next step, helping them talk through their concerns just like you would for a friend, a friend going through a hard time that's maybe making an emotional decision. Not a good one, right? We're going to gently and very kindly, but remind them of maybe something they're not thinking about, maybe a long-term consequence of this decision that they should remember. That's what we do for people we care about. So, remember, nothing here is pushy. This is simply to guide, simply be that conscience or that friend to our patient.

Okay, four areas. So, number one, where are we being an order taker on the phones? That key first question always comes up. "Are you in-network? Do you take my insurance?" Now, an order taker response would be saying, "No, we're not in-network," or, "We are out-of-network," and leaving it at that, letting the patient ask the question and simply spitting back out a simple answer, not very inspiring. But we can be more of a guide in this way, right? We can be asking them. And if you are doing this, great job. Make sure we're sticking to this. This is the consistency piece. "We are not limited by the insurance contracts." It sounds a lot better. And we can keep going to explain it so we don't mislead anyone.

We can still handle all the insurance paperwork, we can still apply most benefits here, or you can call it out-of-network benefits here, we get proper long-term solutions that last rather than bandaids, cookie cutter fixes, whatever you like, whatever you connect with that you think could really work to help give your patient a good reason to come here. This is being a guide. This is showing them that second umbrella. All right? So, think about that. Where can you be more of a guide? Another area, and this is on the business side, is the schedule. Simply by asking the patient, "When do you want to come in? When's good for you?" Right? It seems very polite, but it is an order taker question. It's literally asking the patient what they want. Now, we can still be kind, and still guide them, and get them in where we know is going to be best.

So, a tool you can use for this, is every week or every day, creating a list of the next available anchor appointments, or the next new patient appointments. And this way, we can easily guide the patient. "Patient, the next options are this date and time or this date and time. Which would you prefer?" All right? Still letting them choose but guiding them to where we know is best. That's going to be more of a guide. Okay? So, think about that, think about where we can guide our patients more.

Number two, where are we being an order taker in the clinical space? All right? And now, we always say you must ask questions. This is something you hear us say often and a lot of you do it well.

Now, the one trap you don't want to get into that is an order taker question is when it's too simple, when the question is just, "Any questions, patient?" And a lot of the times it's no, or it's a question about insurance, and we kind of leave it at that. So, we want to look here about how can we ask better questions, where can we be more of a guide by us choosing what the focus of the conversation is rather than letting our patient decide. So, we could talk about their goal, where are they headed if maybe they don't move forward? Maybe we talk about possibilities, moving beyond just problems and getting curious. Do you know anyone that has Invisalign? Have you been curious about the process? Did you know it's not just for cosmetic reasons? There's a lot of ways we can of guide the patient through questions.

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Number three, being an order taker in the triangles of trust. Okay, so I'm going to focus on the final triangle of trust, that handoff, from the clinical space to the business space. **Where are we repeating patient excuses?** So, this is where we take their objections and we literally, like an order, repeat it to the next team member and it does not help anyone. So, this is where if we catch ourselves saying anything like, "Patient wants to check their insurance," or "Patient only wants to do what insurance covers," or "Patient wants to talk to his wife first," right? These are things that we hear and we sometimes just repeat like an order. So, we want to be very mindful here. This is going to require mindfulness and we have to watch ourselves and listen to ourselves speak to make sure we're not taking the patient's order, but we're guiding them honestly.

So, the phrase I want you to use, and you can of course use whatever you like, but this is a phrase that we've had great feedback to, is, **"Patient has some questions about the next steps."** Okay? That's an honest response. If they're not quite ready to go yet, if they have some objections they've mentioned, it's a little bit of a hint to that, but it allows us to focus more on guiding the patient to what's important. So, as a better triangle of trust, rather than just saying something as an example, "Patient wants to wait until their insurance resets." Now instead, we can say something like, **"Doctor and patient agreed that they're on track with his goal to get healthy, get back to maintenance mode. Now, he has some questions for you about the pace of the next appointments, but we are on the same page, that this is the goal and we're going to make it happen. We're going to get Mr. Smith back on track with his health. Thank you for your time today."** Right? Just a nice guiding, guiding them to what's important, reminding them of the health, that's where we can do more of a guide in the handoffs, in the triangles of trust.

Number four, order taker in treatment presentation. Okay, how quickly are we jumping to **insurance and financing.** Right? That's literally order taking their main concern. We know it's what they want to know about, we know it's the first thing on their mind, but if we are following that lead, and if that's where we're starting, we're just giving into their focus. **So** instead, I want you to think about: where can we guide them to focus on other things, on the outcomes, on what they get for the treatment, on why this is going to be worth it?

So, think about ways...maybe you start your conversation with their goal, checking in on them. "Hey, I heard that your goal and the conversation you've been having is how you can get pain-free. That's wonderful, tell me about it. How do you feel going through the conversation?" **Maybe you review their photos together instead of doing an itemized treatment plan list.** We talk about the treatment with the photos. There's lots of ways we can think about being more of a guide and getting their attention on something else.

The second area I want you to focus on with treatment presentation is follow-up. Are we letting them tell us that they're going to call us when they're ready? Because that's being an order taker. Or are we doing a really good job of scheduling the follow-up? Always polite, always understanding and accepting of whatever they say, you can say, "I understand if you want to talk to your husband first, that makes sense. Here's how we can help. Let's set up a follow-up call next week. This will give you time to have a conversation with your husband, you can have any questions you might have, and we can reconnect on a call and you can let me know your decision then. How's 9:00 AM on Monday?"

That's guiding the patient, right?

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So, think about this. Four different areas we can zero in on and see where can we step up and be more of a guide. And that's it. Plenty of discussion here for you to dive into.

So just remember, the kindest thing you can do to help your patients is to guide them towards getting healthy and help them justify the investment in themselves.

Everyone wants to be smart with their money, everyone deserves to be healthy. And this is one thing you can do to help your patients in a very meaningful way, is guiding them to feel smart about their decision, not letting them off the hook, helping them see that moving forward is in their best interest, and continuing to help them in whatever way that means to you.

So, for the final exercise, write down your personal commitments. This is not for the team, this is on an individual basis, or recommitment, so things that are working, that your focus is going to be to do it more consistently and every day. And that's going to be your focus until we next meet again. So, make yourself proud, make your team proud. I hope y'all have a great discussion. Thanks everyone and talk soon.