Patient Retention Scripts

877-777-6151
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Why Develop A Script?

Planning the structure of what you are going to say to a patient increases the chance that you will get the result you are looking for. Depending totally on your ability to think on your feet puts you at risk when trying to reach the objective of what you are about to say.

The key to writing good scripts is to use words, phrases and questions that tend to work most often with patients in getting them to react the way you want and then learning how to use them in a way that comes across like they just came off the top of your head. Scripts help us to maintain control of the conversation, keep it on track and take it to the point of getting a positive reaction, which is your ultimate objective.

If there are no scripts, different team members will say different things, therefore you will never know which words, questions or phrases are the most effective. Preparing scripts will enable the majority of personnel, who may have average skills, to raise their level of performance through the use of a script that has already proven to be effective.

Although scripts provide a guide for a simulated conversation, the patients should always feel they are having a natural conversation. They should never feel they are being read to. In normal conversations, people take turns speaking to each other.

Scripts must provide opportunities for the other person to talk. Use definitive words such as definitely, “We definitely need to re-evaluate that upper right side”, Absolutely, “I absolutely agree with you”, Let me recommend, “Let me recommend that Mary, our hygienist, show you the bleaching technique you’ve been reading about”, “Certainly, I will tell Dr. about your concern with the crown”, I assure you, “I assure you that you’ll be out by 4:00”. The idea is to project assurance and credibility.

Bring the team together and decide as a group what terminology you think will be most successful. Try more than one word or phrase. Tape record your attempts, play them back for the group and decide together what will work best for your patients.

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Scripts: Recall-Patient Retention

Reactivating Past Due Patients

"Hello, (Patient’s Name), this is (Your Name), from Doctor (Doctor’s Name) office. How have you been? [If there has been recent treatment prior to the call, ask about it.] Doctor (Doctor’s Name) mentioned to me this morning that he/she was concerned that your last visit to our office was (Date). I would like to make an appointment for (treatment). Would a morning or afternoon time be better for you?"

Pause and listen - what do you hear? Does the patient have a concern about: Money? Time? Discomfort? Identify the concern and respond accordingly.

"If I can arrange to take care of this concern, would you want to make an appointment?"

Patient says, "No"

"(Patient’s Name), have you had a problem in our office that has prevented you from returning?"

Patient says, "Yes"

"Would you be so kind to tell me what concern you have had so I can be sure it doesn’t happen again. I only wish we had known before now. If I can take care of this problem, would you then make an appointment?"

Reactivating Unscheduled Treatment with Doctor

"Hello, (Patient’s Name), this is (Your Name), from (Doctor’s Name) office. How have you been? [If there has been recent treatment prior to the call, ask about it.] Doctor (Doctor’s Name) was concerned that you might start having discomfort if the treatment he talked to you about isn’t done. I would like to make an appointment for (treatment). Would a morning or afternoon time be better for you?” Pause and listen - what do you hear?

If you do not reach the patient by phone:

On the first call, if the person you are calling is not available, leave a message saying, "(Patient’s Name)? This is (Your Name) from (Doctor’s Name) office. Would you please call me regarding your dental treatment. If I don’t hear from you by next week, I will call you back. I can be reached (day and time) and our phone number is (phone #)."

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On the second call, if the patient is not available say, "This is (Your Name) from (Doctor’s Name) office. As a courtesy, I am calling back to schedule your appointment for (appointment day and time). I can be reached (day and time) and our phone number is (phone #)".

**Reactivating Recall Patients**

"(Patient’s Name)? Hello, this is (Your Name of (Doctor’s Name) office. I’m very happy I was able to reach you. Our records indicate your last professional cleaning and oral health examination was (when). At that time Doctor noted he/she wanted to re-evaluate your gum condition in (month) and it is now (month). I am sorry I have had a difficult time reaching you. Our hygienist, (Hygienist Name), and (Doctor’s Name) would have time available on (day) next week to see you at (time). Would that be convenient?"

**Scheduling Recall Patients**

"This is (Your Name) from (Doctor’s Name) office. Is this (Patient’s Name)’?"

"Yes, it is. " (Patient’s Name), as a courtesy of our office, your records indicate that Doctor recommended re-examining you this month. Doctor and (Name of hygienist), our hygienist, who treated you last (month) indicated an area of concern on the lower right side of your mouth.” “Is there a day or time of day that would be convenient for you to come in?”

**Patients Who Fail Appointments**

"(Patient’s Name)- Example- Mr. Charles?"

"Yes."

"This is (Your Name) from (Doctor’s Name) office. We were expecting you for your appointment at (time) and I was concerned that maybe something happened?"

The number of times a patient should be permitted to fail their appointment is a judgment call on the part of the person taking the call. Listen to the patient’s reason for not keeping the appointment. If the patient has given a non-valid reason more than once, an approach such as the following could be given:

"(Patient’s Name), we are obviously having trouble coordinating a time that’s convenient for you and us. I don’t have any available appointments at this time, however, I have your appointment information and I will telephone you when I have an opening to see if you would be available."
Patients Due for Recall With Previous Balance

“(Patient’s Name)? Hi. This is (Your Name) from (Doctor’s Name) office. I wanted to let you know you’re due for your periodic oral health exam and professional teeth cleaning. Because you have an existing balance of (amount), we would need for you to pay for the service when you come in, which would be $(amount of service) or would you rather we keep checking your account status and notify you once your account has been paid in full?”

Hygienist Explanation of Recall System to Patient

“(Patient’s Name), as a courtesy to you, our office will be sending you a notice to remind you of your professional cleaning and dental examination. You should be receiving this notice around the middle of (month). When you receive the notice, please call (Name of Patient Coordinator), our Patient Coordinator. She will be able to effectively schedule an appointment that will be convenient for you. So if you would put your name and address on the envelope, I would appreciate it.”

Reaching Voicemail

Everybody has telephone voicemail, especially when making calls during the day when most patients are working. It’s okay to leave messages being careful to identify who is calling and why you’re calling. If you’re going to ask the patient to call you back, leave your phone number and the hours you can be reached. But in order to remain in control, you may wish to structure the message this way:

“Hi (Patient’s Name). This is (Your Name) from (Doctor’s Name) office. I’m calling as a courtesy to schedule your professional teeth cleaning and dental exam. You can reach me at (telephone #) (day through day), during (work hours). If I don’t hear from you in a week, I’ll try you back. Thanks (Patient’s Name). Oh by the way, we are looking forward to seeing pictures of your new ski boat.” (Finish with something personal).

Patients Who Say “I will call you back”

As time goes on, patients who said they would call you back never do. This telephone script may help you to find out why.

“(Patient’s Name), this is (Your Name) from (Doctor’s Name) office. Our records show that you haven’t contacted us to schedule your dental health examination and frankly we’re concerned. The only thing we can think of is that we must have disappointed you in some way. So, I’m calling to find out if or how we may have let you down.”
**Overcoming Objectives**

“Good Morning (Patient’s Name)? This is (Your Name) from (Doctor’s Name) office. Our records indicate that you’re due for your oral health examination and professional cleaning and I’m calling to schedule an appointment. Are mornings or afternoons best for you?”

“Well, right now would not be a good time, I’ll give you a call when I am ready.”

What has happened in this conversation? The patient is now in control. They’re in the driver’s seat. We don’t know why “now” is not a good time. Let’s take an imaginary trip through the phone and into the patient’s environment. Here we find the patient is still distraught from an argument she had with her boss yesterday and this morning she has a sick grandchild and another one running late for school. The phone rings and it’s you. Scheduling an appointment to have her mouth examined is not of great importance at the moment. Your call was simply another interruption in an already hectic life. The “timing was not right.” But how are you supposed to know that? First and foremost don’t take the objection as a rejection. The patient decided not to schedule. Does that mean that the present timing is just not good and later might be okay? Perhaps. Let’s now continue with the conversation to find out more information.

“(Patient’s Name). It’s not an inconvenience for me to call you back at a later date. Would that be acceptable to you?”

“No, I’d rather call you back when I am ready.”

What you do not want to do at this point is to continue to press for the appointment. Be very pleasant and accept that the patient has told you twice that they would call you back.

“(Patient’s Name), that’s fine. We’ll have your records here in safe keeping and I’ll make a note that you’ll give us a call.”

**Scheduling Recall**

“(Patient’s Name)? This is (Your Name) from (Doctor’s Name) office. How are you? Our records indicate that you are due for your oral health examination and (pause) as we promised when you were here in (month), we are calling to schedule for you (pause) a convenient time to re-evaluate the condition of your gums. Is there a time that is more convenient for you than another?”