Discover The “Magic Formula” for Patient Retention

Presented by:
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Global Team Solutions
Speaker Disclosure

Denise Ciardello is contracted with Henry Schein One to provide customer training services and has been paid an honorarium by Henry Schein One to teach a continuing dental education session at this conference.

Course Objectives

✔ Determine your patient retention ratio

✔ Analyze your number & what it means to you

✔ Establish patient-centric techniques to encourage retention

✔ Devise a system to actively engage your patients and create long-term relationships

✔ Create strategies to work more confidently and efficiently
What is your patient retention ratio?
What is a healthy ratio for sustainable growth based on industry standards?
Consistent
Convenient
Comfortable
Professional Culture

info@GTSgurus.com
MISSION
It is the mission of our practice to provide our patients with a high quality dental experience and exceed their expectations of service. Our goal is to educate and offer comprehensive, ideal dental care. We will consider treatment options and choices where possible.

Quality is never an accident; it is always the result of high intention, sincere effort, and skillful execution; it represents the wise choice of many alternatives.

Smiles by Burgess, The Woodlands, Texas

We will have a distinctive, unique, fun dental practice that exceeds the expectations of the most discriminating patients, building enduring relationships that can open hearts. We will do this while keeping a balance in our personal and professional lives.

Michael C. Bell, DDS, Austin, Texas
NP Telephone Call Slip

Date__________________________

Name__________________________________________________________

Who may we thank for referring you to our practice?

Phone (H/Cell)________ (W)________________________

Email:__________________________________________________________

Reason for call__________________________________________________

Are you in pain? Yes No

How long in pain?________

Describe the pain: Throbbing/Sharp/Dull___________________________

Sensitivity? Hot / Sweet/ Cold / Pressure ___________________________

How long has it been since your last exam?_________________________

Will we be helping you to bill insurance? Yes No

Insurance Co:___________________________________________________

Name of insured:_________________________________________________

Employer:_______________________________________________________

Group #:________________________________________________________

DOB______________________ ID#______________________________

Any Medical considerations we should be aware of?

Have you ever had to premedicate prior to a dental appointment? Yes No

Appointment Date________________ Time___________________________

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Appointment Date________________ Time___________________________

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appointment reminders
Effective Communication

info@GTSgurus.com
New Patient Appointment

- **90 min appt**
- **20 min**
- **10 min**
- **40 min**
- **20 min**

Morning Huddle
Meetings
**MEETINGS**

**AGENDA**

**ACTION PLAN**

<table>
<thead>
<tr>
<th>Room</th>
<th>Time Period</th>
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</table>

<table>
<thead>
<tr>
<th>OBJECTIVE</th>
<th>TASKS</th>
<th>SUCCESS CRITERIA</th>
<th>TIME FRAME</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(list of key)</td>
<td>(what you need to do to achieve the goal)</td>
<td>(how you will identify your success)</td>
<td>(by what date you should complete the task)</td>
<td>(what or who can help you complete the task)</td>
</tr>
</tbody>
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**Strong Team**

info@GTSgurus.com
Statistics

Be Grateful!

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The Magic Plan for Patient Retention

1. Retention vs Loyalty
   Know the difference
2. Great Customer Service
   SMILE!
3. Effective Communication
   Schedule
   Huddles
   Routine Meetings – 6 Steps
4. Strong Team
   Referrals
   Hand-offs
   Recall
   No Super Stars
5. Attitude of Gratitude
   Please
   Thank you
   My Pleasure

**Bonus:** Recall patients/Active Patients = Your Retention Ratio