

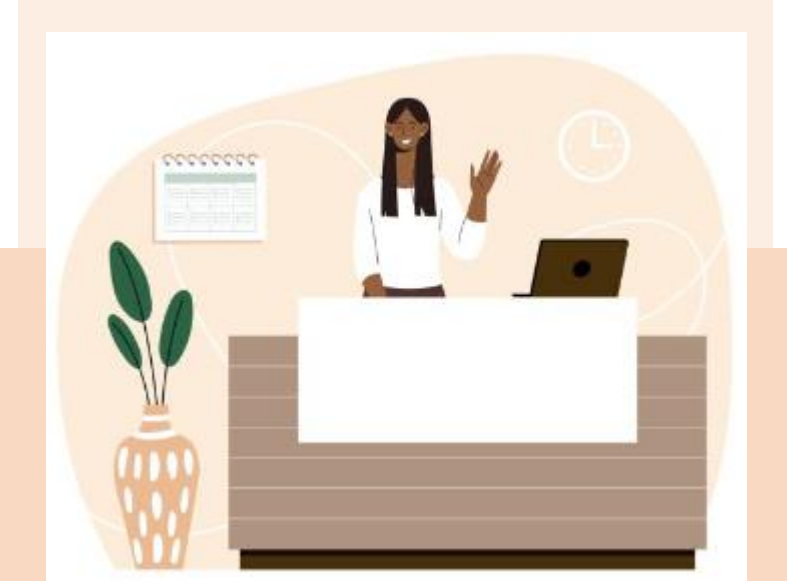
# “You Had Me at Hello”

Be the Best at Front Desk

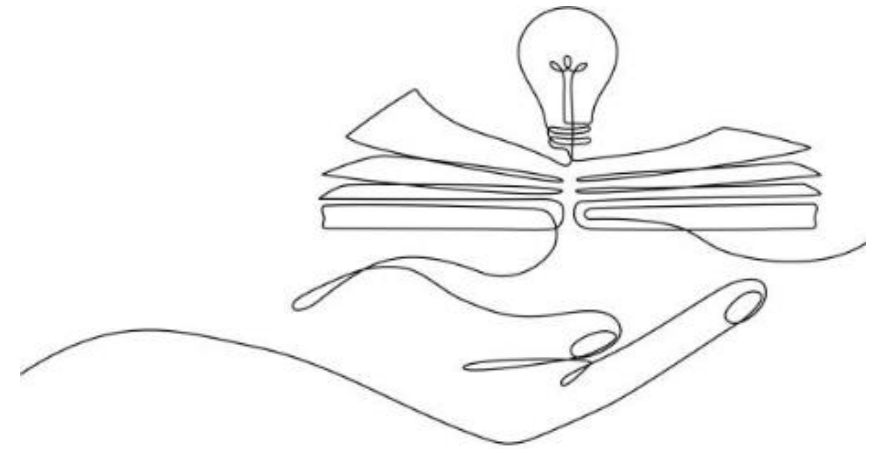
The front desk plays a key role in shaping experiences and ensuring office efficiency.

This presentation will provide strategies to improve customer service, communication, scheduling, and collections.

**Be the reason patients return—and refer others.**



# Learning Objectives



By the end of this session, you will:

- Learn how to be a customer service superstar  
(think: the Beyoncé of the front desk).
- Perfect your phone and in-person communication skills—because *"What?"* is not a great response to a patient.
- Discover how to keep the schedule full without bribing patients.
- Master financial discussions without awkwardness (or sudden patient disappearances).

# Introduction



- **What makes your office click?**

- A positive team culture where everyone supports each other.
- Efficient workflows that minimize downtime and maximize patient satisfaction.

- **What keeps your schedule always full and flowing?**

- Strategic scheduling and patient follow-ups.
- Reducing cancellations with proactive reminders and confirmations.

- **How can you juggle responsibilities while staying calm, smiling, and loving what you do?**

- Time management techniques to balance calls, check-ins, and scheduling.
- Self-care strategies to prevent burnout.

# Becoming a World-Class Customer Service Champion



## The Importance of First Impressions

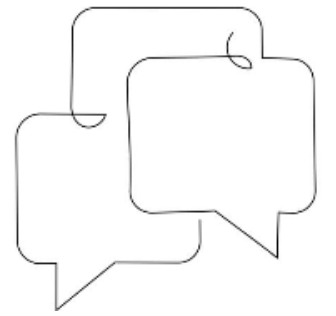
A patient's experience begins with their first interaction. (In Person or on the phone)

- The Psychology of First Impressions
  - The 7-38-55 rule of communication:
    - ❖ Words (7%)
    - ❖ tone (38%)
    - ❖ body language (55%)
  - Understanding patient anxieties and expectations

- **Intentional Communication**
  - ❖ Implement Use **tonal mirroring** to match a patient's energy level
  - ❖ Implement **The Power of the Pause**
- **Psychological Comfort** Techniques
  - ❖ Make **empathetic acknowledgments**
  - ❖ Observe **non-verbal cues**

- **Creating a Welcoming and Professional Environment**
  - ❖ Greet each patient by name and make eye contact.
  - ❖ Maintain a clean and inviting waiting area.
  - ❖ Use your PMS to keep information about the patients:
  - ❖ Keep a **patient preference database**: Does Mrs. Jones prefer morning appointments? Is Mr. Patel always nervous before procedures? Use this data to tailor interactions.

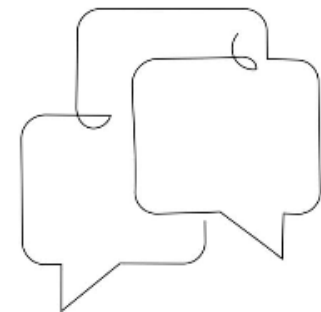
# Becoming a World-Class Customer Service Champion



## Navigate Challenging Situations with Executive-Level Diplomacy

The key to **de-escalation** lies in **controlled communication and problem-solving**:

- 1. Remain calm and composed:** Maintain a low, steady tone and avoid mirroring the patient's frustration.
- 2. Acknowledge the emotion:** *"I can see that this is upsetting, and I want to make this right for you."*
- 3. Gather information:** Ask clarifying questions to fully understand the issue before offering solutions.
- 4. Provide solutions, not excuses:** Frame responses around what can be done rather than what cannot.
- 5. End on a positive note:** Summarize the resolution and express appreciation for their patience.



## **Why Do people call the office:**

- Schedule an appointment
- Address a dental emergency
- Inquire about billing or insurance coverage
- General questions regarding their oral health

# Perfecting Phone & In-Person Communication

First rule: Sound like you want to be there, even if it's Monday morning.



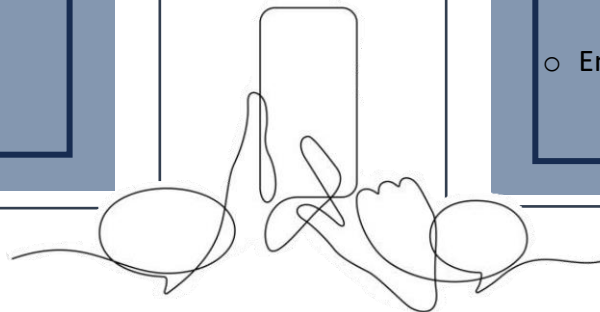
## Answering the Phone with Confidence

### Answer within 3 rings

- **Use a consistent and professional greeting:**  
*"Thank you for calling [Office Name], this is [Your Name]. How may I assist you?"*
- **Smile!** *They can hear your smile*
- **Empathic Listening** – Identify the emotional tone behind a patient's words. If they sound anxious, acknowledge it before providing a solution.

## ○ Managing Multiple Phone Lines

- Politely ask a caller to hold when necessary. Instead of saying, "Hold on a sec" and disappearing into the abyss, say:  
*"Would you mind holding for just a moment? I'll be right back with you."* (Because nobody likes feeling abandoned.)
- Repeat key information back to the caller
- Avoid interrupting; take notes as needed
- Be well-versed in office policies, procedures, and services
  - If unsure, confidently say, "That's a great question, let me find out for you."
- Ensure consistent messaging among all team members



# Building a Healthy Schedule ~

## Proactive & Reactive Systems

### Proactive Scheduling Strategies

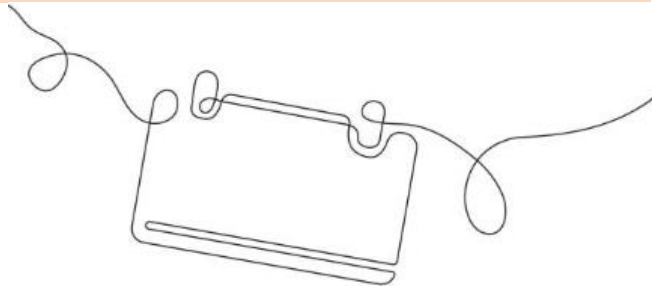
- Priority Blocking
- Confirm appointments and follow up on recalls to prevent gaps in the schedule.
- Encourage patients to pre-book their next visit before leaving.

### Reactive Scheduling Strategies

- Keep a short-notice list to fill open slots.
- Prioritize urgent or high-production appointments when rescheduling.

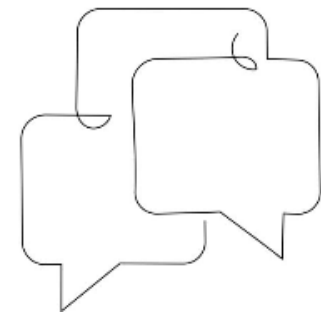
### Balancing Productivity and Patient Experience

- Maintain a structured but flexible schedule to accommodate patient and office needs. That means **Balancing High-Production vs. Routine Appointments**
  - Too many high-production cases in one day? Exhausting.
  - Too many quick cleanings? Not great for production.
  - Find the **sweet spot** between profitability and sanity.





# Efficient Collections – Talking Money Without Awkwardness



## Efficient Collections – Talking Money Without Awkwardness

**Presenting Financial Information-** Be transparent about costs and payment options before treatment begins.

- Patients don't like surprises—(unless it's free whitening)
- Be upfront about costs, payment options, and insurance details.

## Handling Patient Concerns About Cost

- Offer solutions and payment options to ease financial concerns.
  - When a patient says, "That's expensive!" avoid saying, "Yeah, I wouldn't want to pay that either."
- Instead, use empathy: *"I understand. Let's go over some payment options that might help."*
- **Payment Policies and Follow-Ups**
- Clearly communicate payment expectations.
- Implement a structured process for tracking outstanding balances.
  - A friendly reminder call should sound like you're helping, not chasing.
    - "We wanted to check in regarding your recent visit and discuss options for your balance."
  - If a patient ghosts you on a balance, stay professional—no need for ransom notes.

### **Key Takeaways & Closing**

- First impressions set the tone for the patient experience.
- Clear and professional communication is essential.
- A structured and flexible schedule helps the office run smoothly.
- Financial conversations should be handled with confidence and empathy.
- Organization and a positive attitude create a better work environment for both staff and patients.