



UNDERSTANDING THE CLOSE RATE

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01

INTRODUCTION

Case acceptance directly impacts the financial growth of an orthodontic practice. When patients accept proposed treatment plans, it indicates that they have confidence and trust in your practice. The patients will most likely also refer other patients to your practice. This leads to increased revenue and a steady flow of patients, ensuring the financial growth of the practice.

A high conversion rate allows for effective scheduling and less gaps in the practice's schedule. To achieve a high closing rate and maximize effectiveness, read on to discover what is needed.

✓ **1. Good communication:**

- a. Effective communication is key in order to achieve a high conversion rate. Being clear and concise helps patients understand their treatment plan and options in order to make a decision.

✓ **2. Tools for patient education:**

- a. Visual aids, digital simulations and informative material helps the patient understand and visualize the treatment process and its benefits.

✓ **3. Build Trust:**

- a. Establish a caring, empathetic environment where the patient feels heard and trusts you are there to help them today. Demonstrate professionalism, knowledge and genuine concern for their well-being.

✓ **4. Transparent treatment plans:**

- a. Clearly outlining the treatment plan, outcomes and costs will make it easier for the patient to make a decision.

✓ **5. Listen to your patients needs:**

- a. Listening to your patients concerns will help you gather more information ahead of time to discuss with your doctor. Prepping him/her can help your doctor tailor more to their needs. Instead of doing all of the talking in your consults, ask questions and give the patients and parents a chance to express concerns.



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02

UNDERSTANDING THE TREATMENT COORDINATOR'S ROLE

As a treatment coordinator, you play a key role in your orthodontic practices by facilitating communication between the orthodontist, patients, and the rest of the dental team. Your primary focus is on ensuring a smooth and organized process for orthodontic treatment.

THAT WOW NEW PATIENT EXPERIENCE

Think outside of the box. Create a short video that you can send to new patients 1-2 days prior to them coming in introducing yourself, doctor, and a quick tour of the office. Offer them educational videos; this alone will inform patients about orthodontic treatment, procedures, and the importance of oral health. Using visual aids and having the capability of sending these videos to patients will help them understand the treatment plan, process, and goals. Finally, send personalized thank-you messages or emails after the initial visit. This positive experience can contribute to patient retention and word-of-mouth referrals.

Here's examples of how to wow your patients:

✓ Personalized Welcome Video:

A day or two before the patient's first appointment, send them a short, personalized video. The video starts with you, the Treatment Coordinator, warmly greeting the patient by name:

"Hi [Patient's Name], my name is Christina, and I'll be your Treatment Coordinator here at [Your Practice Name]. We're so excited to meet you! I wanted to take a moment to introduce you to our practice and what you can expect during your visit."*

The video then transitions to a brief introduction of the doctor, who shares a little about their approach to orthodontic care.

"Hi [Patient's Name], I'm Dr. [Doctor's Name]. I look forward to meeting you and helping you achieve a healthy, beautiful smile. In this video, Christina will give you a quick tour of our office so you can feel right at home when you arrive."*

✓ Virtual Office Tour:

The video continues with a virtual tour of the office, highlighting the reception area, the treatment rooms, and any special features like your Itero, or a fun kids' zone.

As you can see, we've designed our office to be a welcoming and comfortable space for you and your family. We want you to feel relaxed and at ease every time you visit us.

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✔ Educational Content:

Next, the video can briefly introduce some educational content that patients can explore on their own time.

*To help you prepare for your visit, we've included some helpful videos about orthodontic treatment and the procedures we offer. These videos will give you a better idea of what to expect and how we can work together to achieve the best results.

✔ Post-Visit Thank You:

After the patient's initial visit, follow up with a personalized thank-you message or email.

*Thank you, (Patient's Name), for visiting us today! It was a pleasure meeting you, and we're thrilled to be a part of your journey to a healthier, more confident smile. If you have any questions or need anything at all, please don't hesitate to reach out. We look forward to seeing you again soon!

Impact:

This approach not only provides the patient with valuable information but also creates a warm, welcoming atmosphere that sets your practice apart. The combination of personalized communication, educational resources, and a thoughtful follow-up leaves a lasting impression, encouraging patient retention and generating positive word-of-mouth referrals.



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UNDERSTANDING TREATMENT PLANS

When a treatment coordinator possesses a deep understanding of the treatment plans and maintains a close working relationship with the doctor, it significantly enhances their ability to convey expertise to patients and parents. This seamless collaboration allows the coordinator to explain the intricacies of the treatment options, answer questions confidently and accurately with precision, and address any concerns that patients may have. The synergy between knowledge and teamwork not only boosts the coordinator's credibility but also instills a higher level of trust and confidence in patients. When all of this comes together, competence and commitment in guiding patients through a well informed decision is showcased.

Example

"Mrs. Smith, based on our examination and the X-rays we took today, Dr. Brown identified that your son would benefit from Orthodontic treatment to correct his bite and align his teeth. The treatment will take an estimated 18 to 24 months. Depending on compliance like rubber band wear, breakage and kept appointments. We have two options: traditional metal braces or clear aligners. The metal braces are more visible and Johnny could pick some fun colors but, he will need to be careful with his diet in order to avoid broken brackets that could prolong treatment. The other option would be clear aligners. They are less noticeable and depending on lifestyle this may be the best option. It's great for patients who play sports like football, softball/baseball and our swimmers. With long days that involve a full school day and practices and games clear aligners make it easier with active lifestyles. However, Aligners require strict adherence to wearing them 22 hours a day. If not worn the minimum amount of time as prescribed would prolong treatment. Both options will effectively achieve the same result. Do you have any questions about these options, or is there a particular preference you have in mind?"

In this example, the communication is clear, concise, and informative, allowing the patient to easily understand the treatment options and make an informed decision.

GATHERING FINANCIALS

Your role as a treatment coordinator is pivotal in fostering a holistic and supportive experience for patients and their parents. By collaborating closely with your financial coordinator and insurance coordinator to gather financial information, you empower families to make the best decisions possible about their orthodontic treatment. This transparency not only helps them see the value in their investment, but also reinforces their confidence that they've made a sound, beneficial decision.

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ONGOING COMMUNICATION

After all, we establish the lifelong relationships along the way! Implement a follow-up process to check on patients progress and address any concerns. Provide resources and contact information for patients to reach out if they have questions between appointments. The TCs role isn't just to get the patient started with treatment. It is being there for them along the way. Think of it as being their concierge throughout treatment.



FOLLOW-UP WITH OBS AND PENDING PATIENTS

Reaching out to these patients ensures that they are receiving the necessary attention and prevents them from being overlooked. It's best to provide constant support and communication whether they started treatment or are in an observation phase. Personally connect with them through a quick phone call or an email expressing how excited you are to see them soon. This applies to communication with pending patients too. Keep in constant communication the next day, next week, and at designated intervals to prevent these patients from slipping through the cracks. Remind them you are there to help them and answer any questions they may have.



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If you currently do not have a set “recall-system”, we recommend the following:

✓ 1. Initial Contact (After Consultation):

- a. Send a follow up message through Braces Academy with a video if you want to explain a part of treatment.
- b. Send a personalized thank you email or handwritten note expressing your gratitude for their visit.
- c. Include a highlight from the consultation- this should be something personal and not treatment related.

✓ 2. Week Follow-up:

- a. Place a friendly follow-up call to inquire about any questions or concerns that may have arisen after the appointment.
- b. Offer additional information, if needed, and provide reassurance about the treatment process.

✓ 3. 30 day Follow-up:

- a. Send a thoughtful email to check in on their decision and provide any updates or current office “specials” on pricing. Establish a caring, empathetic environment where the patient feels heard and trusts you are there to help them today. Demonstrate professionalism, knowledge and genuine concern for their well-being.

✓ 4. 60 day Follow-up:

- a. Make a personalized phone call to discuss decision
- b. Emphasize (if any) the importance of not waiting to start treatment due to doctor's findings and recommendations

✓ 5. 6 month Follow-up:

- a. Place a phone call to recap treatment plan and see if a decision has been made
- b. Extend an invitation to come back to the office for a follow-up appointment with your doctor to see if anything has changed.

✓ 6. 12 month follow-up:

- a. Make a final courtesy call to express your commitment to their orthodontic health and address any lingering doubts and concerns.
- b. Extend the invitation to schedule an Observation appointment to see if any growth has happened or changes that may have occurred that could reflect in a possible treatment change.

At this point, you have whole heartedly done your job to make sure the patient and parent are trying to arrive at an orthodontic decision. Should communication not have been established, we advise considering this patient for dismissal from potential treatment. Redirect your focus towards nurture the leads within your office that exhibit readiness to proceed.

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03

THE CLOSE RATE: DEFINITION AND SIGNIFICANCE

Explanation of the close rate and its relevance to the success of the practice

The close rate is a key performance indicator that significantly impacts the success of an orthodontic practice. It encompasses financial health, patient satisfaction, operational efficiency, and growth potential. By focusing on optimizing a successful close rate, orthodontic practices can enhance their overall performance and provide exceptional care to their patients. A high close rate directly contributes to the financial success of the orthodontic practice. More patients choosing to undergo orthodontic treatment lead to increased revenue, ensuring the practice's financial stability and growth. Establishing trust and rapport during consultations is crucial, and a strong relationship encourages patients to choose the orthodontic practice for their treatment needs. Satisfied patients are not only more likely to complete their treatment but may also become advocates, referring others to the practice and contributing to future practice growth.



Benchmarking and setting goals for the close rate with your doctor.

- Analyze your existing close rate
- Discuss opportunities for improvement
- Set realistic, attainable goals *suggestion - Put in play a bonus system
- Effectively communicate and provide and gather feedback
- Enhance your patient education experience
- Inspire your growth as treatment coordinators
- Celebrate achievements
- Collaborate
 - By working closely with your doctor, you can align efforts and leverage insights from both clinical and patient perspectives. This ensures that you can drive the practice's closing rate to new heights.

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