

# The Science of Appointment Control



# Foreword: Gina Dorfman, DDS



A scheduling coordinator knows how frustrating it can be to put together a perfectly engineered day just to have it fall apart at the last minute. A dental team is also well aware how hard it is to fill the schedule on last minute notice. Dealing with no-shows and cancellations is one of dentistry's biggest challenges.

On average, **10-20%** of scheduled patients end up breaking their appointments. Depending on the size of the practice, last minute cancellations and no-shows can cost your practice tens of thousands in lost revenue.

What can be done to curb no-shows? More importantly, is the way we confirm appointments actually encouraging irresponsible behavior in our patients?

Traditionally, we've always confirmed patients by phone. These days, people are busier than ever and getting them on the phone may be very difficult and time consuming. The current trend is to utilize technology and confirm patients by text or email. Automating these communications can help save time and reduce stress for your front office team who are already juggling too many things at once. It can also enhance your patients' experience as many patients prefer text and email communications to phone calls. It's critical, however, that we don't put our confirmations on cruise-control.

I strongly feel that it's necessary for dental practices to develop a *written protocol* for confirming appointments and to write down *concrete goals* for the scheduling team. To help you do this, I turned to my good friend and well-known practice management consultant, Sandy Pardue. Sandy graciously agreed to share her vast knowledge on the subject in this e-book.

This e-book will help you gain insights into the causes of broken appointments, what can be done to prevent them, and how to utilize electronic communications while maintaining control over your schedule. It will also provide you with some cool tools and fresh ideas on how to fix broken appointments.

So roll up your sleeves and get stuck in!

# ABOUT THE AUTHOR

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Sandy Pardue is an internationally recognized lecturer, author and practice management consultant. She has assisted hundreds of doctors with practice expansion and staff development over the past 25 years. She is known for her comprehensive and interesting approach to dental office systems, and offers a refreshing point of view on how to become more efficient and productive in a dental practice.

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# INTRODUCTION

Broken appointments are the biggest cause of lost revenue for dental practices and can add a lot of stress. The money a practice loses due to lost appointment time can never be recovered. Gaining control over broken appointments is critical.

Before a practice can really gain control over broken appointments, it must first discover all of the various things that they may or may not be doing that can actually affect the patient's decision to come in.



## Top Reasons for Broken Appointments

1. No concrete financial arrangements.
2. Patient doesn't value the service.
3. Appointment not properly confirmed.
4. Patient objections not detected and handled.
5. Patient is past due on their account.
6. Incorrect information on file.

# PREVENT CANCELLATIONS

No matter how successful a practice may be, broken appointments are not good for a business. Through our investigations into the causes of broken appointments, we've discovered many times they could have been avoided if the practice had been more **proactive**.

It's easy to blame broken appointments on the patient and to start threatening a broken appointment fee. I believe practices have a lot more control than they may realize.

The actions and words of the dental team may either increase cancellations or prevent them.

Many practices are running on auto-pilot and not taking time to educate patients and look at the patient's indicators before scheduling and during confirmations.

**Good control** is the only thing that will guarantee a productive and predictable schedule.



Many broken appointments could have been prevented.

# PREVENT CANCELLATIONS

## TIP #1

### Stop Making Patients Think Cancellations Are Normal!

Take “cancellation” out of your vocabulary. Inform your entire team that you will not be using this word in your practice. Stop saying things like: “If we get a cancellation we’ll give you a call,” or “We’ll probably get a cancellation this week and will be able to get you in.” You want patients to think that broken appointments *rarely* happen.

Stop calling patients and saying something like: “Hi Susan, this is Mary from Dr. Green’s office. We had a few cancellations for next week and I was just wondering if you guys could come in.” This verbiage sends a message to the patients that schedule changes are normal and the practice expects them to happen.

If you call patients that requested an earlier appointment date when scheduling, try saying something like: “I’ve worked it out so that we can see you sooner.” If you are trying to fill open spots on the schedule you can say something like: “We had a change in the schedule.”

If you want patients to think cancelling an appointment is something that rarely happens in your practice, take the word cancellation out of your vocabulary. *If you expect cancellations, chances are you will get cancellations.*

# PREVENT CANCELLATIONS

## TIP #2

### Many Broken Appointments Begin Chairside!

When clinical teams spend more time on patient education before the appointment is made, the treatment plan acceptance is higher and patients are more likely to schedule and keep their appointments.

Getting patients to show up for appointments starts with reinforcing the diagnosis **chairside**. Educate your patients about their condition. Most of you probably feel like you are already doing this. I am asking you to go one step further. Tell them what will happen if they put it off.

Don't assume that patients already know that the problem they are having is going to get worse and that they know it's going to cost more if they put off treatment. Explain that it may get more expensive or that they may start having pain if they wait too long. Let them know it will not get better on its own.

Say things like: "It is going to get worse and you will have pain if we don't get you back soon" or "That cavity is going to get bigger and cost more if we put it off." Patients have to see the **benefits** before they will want it bad enough to find the money and keep the appointment.



# PREVENT CANCELLATIONS

## TIP #3

### Use Good Verbal Skills at the Time of Scheduling!

Often a patient schedules an appointment only to cancel later. This may be an indication that there was something they didn't understand about their needed treatment.

When scheduling patients for treatment, make sure they fully understand why they need to come back and most importantly what will happen if they don't. Give patients your full attention. Ask if they have any questions. Make sure you answer any questions they may have. If they are still apprehensive and you don't handle their true objections, they are more likely to cancel their treatment appointment.

Each time you schedule a patient, let them know the day, the time, the procedure and how long they are going to be there. You could say: "Mrs. Jones, we have an hour saved just for you with Dr. Smith next Tuesday at 2:00 P.M. for your crown."

The tone of voice you use is very important. Speak up and look them directly in the eyes. Speak with certainty. Let them know they made a good decision to get the treatment done and you look forward to seeing them.

# PREVENT CANCELLATIONS

## TIP #4

### Don't Break Appointments With Patients

It is not a good idea to make an agreement with a patient in regards to an appointment time and later call to move them to another time because of a cancellation. It sends a message to the patient that people do cancel appointments and that it's normal. They get the idea that you can just call some other patient to take their spot if they cancel.

Of course it's important to fill last minute changes, but instead of moving your scheduled patients, look for other resources *within your practice* to do this. Most practices have hundreds and maybe even thousands of patients needing to see the hygienist.

Generate a report showing patients due for recall that dates back two or three years. In addition to all the hygiene patients due, there may be dozens and dozens of patients needing to get in doctor's chair. Some practices have a million dollars in diagnosed **outstanding treatment**.

Focus on all of the patients that you have with outstanding treatment and past due recall and get them in!



# PREVENT CANCELLATIONS

## TIP #5

### Don't Schedule Patients Too Far in Advance

Statistics show us that patients are far more likely to change their mind if they have to wait over 10 days for an appointment. Get patients in *as soon as possible*, while their decision is fresh and they still have the intention to come in.

Fearful patients may have thought about calling for quite some time, but could never get themselves to dial the number and make the appointment. They may have dialed the number several times and hung up the phone before you answered. They will be on the lookout for the slightest excuse not to keep the appointment.

Always schedule these people as soon as possible:

- ☐ New patients
- ☐ Emergencies
- ☐ Patients who want an immediate appointment
- ☐ Infrequent visitors
- ☐ Fear cases and procrastinators

# PREVENT CANCELLATIONS

## TIP #6

### Have a Firm Financial Arrangement with the Patient Before You Make the Appointment

Patients with bad accounts tend to break more appointments. *Firm financial arrangements* must be made before the appointment is scheduled.

If you see a patient on your schedule with a past due account or a denied insurance claim don't ignore it. You may decide that you'll discuss their balance in person when they come in, but keep in mind that these patients are very likely to not show. Instead of waiting, reach out to them before their appointment to take care of the balance and to get a firm confirmation over the phone.

# PREVENT CANCELLATIONS

## TIP #7

### Stop Appointing Compulsive Appointment Breakers!

Don't appoint patients who have a history of multiple broken appointments. Be familiar with their broken appointment history before appointing them. They will continue doing the same thing over and over again. These folks do better when placed on a "*short notice call list*" and called when there is a change in the schedule.

Do not pre-appoint repeat offenders for continuous care. These patients should still be educated on the importance of regular re-care visits and informed that they will be receiving a reminder from the practice when it is time to call for an appointment. Once they contact the office, try to get these folks in as soon as possible, no later than several days away, to prevent additional broken appointments or you can put them on a short call list.

# PREVENT CANCELLATIONS

## TIP #8

### Listen Closely to Patients When You Call to Confirm

When you listen closely, you can usually tell if patients are trying to back out by the tone of their voice or the questions they ask during confirmations.

If they start questioning you about the appointment or sound uncertain, they may be trying to back out. Handle it and don't let it become lost time on the schedule. You want to make sure you get a true confirmation.

If a patient sounds even slightly apprehensive, ask them if they have any questions and make sure that you fully answer them. Address their objections. If you don't, they may confirm now only to call and cancel later.

# PREVENT CANCELLATIONS

## TIP #9

### Do Not Assume You Have the Right Contact Information

Never assume you have all of the correct contact information. Many patients provide numbers that cannot be reached.

Actively collect mobile phone numbers and email addresses and enter them into your practice management system so that you have multiple ways of contacting your patients.

Let patients know that you will be contacting them to confirm the appointment. Ask them: "How can we reach you during the day?" This way, you have their preferred method of communication and the correct contact information.

Also make sure that all of your outgoing mail is stamped "**Return Address Requested.**" This way, all undeliverable mail returns to you with the recipient's new address. Often, patients move and forget to cancel their appointments. By getting their new address, you will be able to update your records and find out who moved out of the area and will not be coming in. If a piece of mail returns, check the patient's record to see if they have an upcoming appointment and contact them to get updated information.

# Appointment Confirmations in a DIGITAL WORLD

Wouldn't it be wonderful if patients were as excited about coming to the office as they are about going to a concert to hear their favorite performer? We could just send them an email and they'd show up.

Unfortunately, this does not work in the real world. Most patients aren't as excited about getting dental work done, so we have to be very attentive to the confirmation procedure.

There are a lot of patients who prefer text and email for confirmations and we want to accommodate them. *Automated confirmation systems* are very convenient for patients and save a lot of time for the team. Unfortunately, it does not work for everyone.

Since the number one priority is getting patients to the office, we've designed a system that utilizes automated email and text messages but still allows you to have control over your schedule.



# Use Technology and GET the Patient to the Office



Postcard **3 weeks** in advance to all pre-scheduled patients



Email or text **3 working days** before the appointment



Phone call **1 working day** before the appointment if still not confirmed

If a patient confirms the appointment via email or text and does not show up, all future appointments will also include a phone call the day before the appointment.

Avoid sending multiple texts and email reminders. Too much communication upsets patients. It makes them think it's common for people to forget about their appointments and it makes the office seem desperate. Make sure that the company you are working with for your automated reminders suppresses additional messages once an appointment is confirmed.



AVOID SENDING  
MULTIPLE  
REMINDERS.

# Telephone Confirmation

Every practice needs to have a solid appointment confirmation system and appoint someone skilled to make the confirmation calls.

*Appointment confirmation* is one of the most important actions in a scheduling coordinator's day. Use the following tips to confirm appointments properly.

1. Start early in the morning.
2. Get familiar with the schedule and make needed adjustments.
3. Identify appointments that have not yet been confirmed.
4. Start by confirming the most productive procedures.
5. Avoid using the word "remind."
6. Avoid saying "just calling to confirm." The word "*just*" makes the call seem less significant.
7. Pay close attention to their response – it will tell you a lot about their intentions.
8. Speak clearly and with confidence.
9. Continue confirming the patients you were unable to reach throughout the day. You can enter \*67 before the phone number to block the caller ID.
10. You may want to **double-book** any patients you are not able to confirm if they have a broken appointment history. Chances are if they are not confirmed, they will not come.

# Do Your Research!

Before you call, **review** the patient's record and **research** specific information about the patient:

- ☐ History of broken appointments
- ☐ Account balance and notes
- ☐ Any other family members coming in at the same time
- ☐ If patient is a child or elderly and will not be driving
- ☐ Need to pre-medicate
- ☐ Any special circumstances and requests
- ☐ Appointment notes
- ☐ Contact information on file

# Filling Short Notice Changes

Sometimes changes in the schedule cannot be avoided. When this happens, the best thing we can do is **fill the last minute opening quickly.**

The best way to find a patient on a short notice is to keep a running list of patients who may want to come sooner. Most practice management software offer a way to do this electronically.

This is a great service to your patients. When you can either fit a patient in on a short notice or call a patient who requested a specific time, they know you are trying to help them and they appreciate your care.

Keep your eyes peeled for patients who'd like to be on that list. You may say: "We rarely have changes in our schedule but I can put your name on our priority list and call you if I can work something out for you."



Keep in mind that as a scheduling coordinator, you are selling the **BENEFITS** of the dental services, not the services themselves."

One would be crazy to think that people want to come to the dentist to have dentistry done! They come so they can have the benefits and/or future benefits of the services received.

Keep this in mind when you are scheduling and sell the benefits!



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