

GUIDANCE ON: THE ROLE OF A TREATMENT COORDINATOR



The role of a treatment coordinator is a separate one from reception, nursing or practice management. It is its own role in its own right, and should not be expected to be done alongside the day to day running of a practice (to a degree).

If the nurse, receptionist or practice manager also serves as the TCO- this is fine, however they need to be given the time to do the role of a TCO. So this would mean time away from surgery or the desk to focus on certain tasks... which we will explore now!

The role itself is quite self explanatory, "Treatment Coordination"- and everything that goes with it! Following the patient journey through from start to finish, being responsible for the level of quality of the patient journey, conducting consultations with patients to discuss treatment options, payment plans, triaging them prior to an appointment with the dentist, welcoming new patients to the practice and helping to put anxious patients at ease.

As the treatment coordinator you can also play a big part in the reporting and data analysis in the practice, possibly assisting with social media marketing, helping develop inventive ideas to attract new patients to the practice and ensuring there is synergy between the surgery and the front desk with what is communicated.

Now... lets break it down a little! Here are a few things to consider when starting off on your TCO journey.

DISC profiling

What is disc profiling? DiSC is an acronym that stands for the four main personality profiles described in the DiSC model: (D)ominance, (i)nfluence, (S)teadiness and (C)onscientiousness.

It is a way of understanding yourself, and others, in easy to visualise segments.

It helps you adapt your talk track and negotiating style in order to get the most out of the person you are interacting with and help to communicate with them on their level.

It is also an incredibly useful tool that all employers should use to help better communicate with employees, and vice versa!

- People with D personalities tend to be confident and place an emphasis on accomplishing bottom-line results.
- People with I personalities tend to be more open and place an emphasis on relationships and influencing or persuading others.
- People with S personalities tend to be dependable and place the emphasis on cooperation and sincerity.
- People with C personalities tend to place the emphasis on quality, accuracy, expertise, and competency.

We believe this is an important first step for any treatment coordinator to start their journey on. You must first understand yourself before trying to connect with others.

When working with the D - or Dominance - style

Try to:

- Make communication brief and to the point
- Respect their need for autonomy
- Be clear about rules and expectations
- Let them initiate
- Show your competence
- Stick to the topic
- Show independence
- Eliminate time wasters

Be prepared for:

- Blunt and demanding approach
- Lack of empathy
- Lack of sensitivity
- Little social interaction

Active
Fast-paced
Assertive
Dynamic
Bold

When working with the i - or Influence - style

Try to:

- Approach them informally
- Be relaxed and sociable
- Let them verbalize thoughts and feelings
- Keep the conversation light
- Provide written details
- Give public recognition for individual accomplishments
- Use humor

Be prepared for:

- Attempts to persuade/influence others
- Need for the "limelight"
- Over-estimating self and others
- Emotional responses

Questioning
Logic-focused
Objective
Skeptical
Challenging

Accepting
People-focused
Empathizing
Receptive
Agreeable

When working with the S - or Steadiness - style

Try to:

- Be warm and supportive
- Give clear expectations and deadlines
- Allow precedent to be a guide
- Provide a consistent and secure environment
- Let them know how things will be done
- Use sincere appreciation
- Show their importance to organizational good

Be prepared for:

- Friendly & warm approach
- Slower to change
- Difficulty prioritizing
- Difficulty with deadlines

Thoughtful
Moderate-paced
Calm Methodical
Careful

When working with the C - or Conscientiousness - style

Try to:

- Be logical and systematic
- Value high standards
- Be precise and focused
- Provide background information & facts
- Be tactful and emotionally reserved
- Show dependability
- Give time to prepare

Be prepared for:

- Questions
- Resistance to vague or general information
- Desire to double check
- Little need to affiliate with other people

ONE SIZE DOESN'T FIT ALL: BEING AGILE WITH YOUR APPROACH

Following on from DISC profiling, it is important to understand that there is no one way to communicate with patients, and what you may think is helpful and informational- may actually be pushing some people further away.

If you have a consultation or meeting with a patient who you have never met before, or spoken to- it is always good to ask a number of questions about what specifically they would like to know, before starting on your talk track, and making sure you pay attention to their answers.

- Some people welcome a fully in-depth conversation about how surgery is performed and the ins and outs of the healing process, and some people are only concerned with the final result and the cost.
- Think of it like this, when you enter a travel agent to enquire about a holiday, what's the first thing you ask for, ...is it the flights and the baggage allowance? Is it the car rental? Or is it the star rating of the hotel and how close it is to the beach? Or maybe, do you go in with a budget-and start your search off that way?
Everyone starts off their enquiry differently- if they want to know about the baggage allowance and cost- discuss this first. If they want to know about hotel star rating and local amenities, this is where you'll start.
- By assessing what seems to be the most important feature of the treatment to the individual, you'll avoid bombarding them with information that will either bore them, or not appeal to them, be agile with your talk track-and don't be flustered if someone wants to cut out information that you would think is vital- everyone's journey is different, and as long as you provide them with the legally required information in writing they can review it in their own time.

Asking the right questions

Your role as a treatment coordinator, is not simply to dispense information, but to listen and find out about the patient you are dealing with on a deeper level. There are some questions that you would never think to ask, however play an important role in the decision making process of the person...here are a couple of examples...

- *“is it yourself that would be paying for the treatment?”*
This helps you gauge if the person is alone in the decision making process, if money could be an issue, or maybe you might need to involve a family member when it comes to financial talks (with the patients say so of course)
- *“If you could wave a magic wand, and change anything about your teeth, what would you change? Whether you think it to be possible or not”*
This helps them open up their mind to what COULD be, and will open their eyes to the fact that nearly anything is possible.
- *“How does this affect your day to day life?”*
This will help to create an emotional response, by recalling how it affects them day to day, this is something we often forget on the days where our teeth don't bother us, but it's important to press on those pain points and remind them of why they have come to see you
- *“Does this problem ever affect your willingness to smile in photos?”*
Again, you're looking for an emotional response to this question, either sadness that they don't currently smile with their teeth, or excitement that what you can do for them will enable them to smile more.

Being present at every stage

- By being present at every stage of your patients journey, this will help strengthen the relationship between you both - we understand that this may not always be possible, so there are different levels at which you can do this.
- In an ideal world, a treatment coordinator would... handle the initial enquiry, be present or host an initial consultation, liaise with the patient when booking in for treatment, follow up after treatment, and communicate with the patient at the end of the treatment journey.
- The large and successful practices are able to have a team of treatment coordinators that do just this, however for smaller practices it's a starting point to at least have a treatment coordinator make contact with a patient at each stage- even if they can't be present for every appointment.
- By doing this, you provide a memorable and remarkable experience for the patient.
- Think of how this would work in your practice, what is possible?

Financial conversations, discussing big and small money

- This can always be an uncomfortable conversation for both dentists and receptionists alike, this is where you come in. Many dentists utilise their treatment coordinator to take control of the “money” conversations, as they know that this is not where their strengths lie. There is no shame in saying to a patient who asks about cost “My role here is to provide you with excellent dental treatment, and it is the role of my treatment coordinator to discuss all the financials with you in a much more comfortable environment than my chair!” and then pass the patient on to you.
- In a best practice setting, conversations about treatment plans and financial implications should be happening away from the surgery space, in a comfortable, quiet and welcoming room. You need to create a “sign on the dotted line” environment for your patients, rather than pushing a quickly printed treatment plan across the reception desk to them and then asking for £15,000.

- And lastly, never be embarrassed by the cost of treatment. Have conviction and purpose when you tell a patient the cost of a treatment plan, and never... i repeat NEVER use the word “expensive”. If a patient remarks saying “oh, that’s quite expensive” all you need reply is, “it’s definitely an investment, and it is one that i know you will be incredibly happy with when complete”
- Expensive implies too much money for what you are getting, whereas Investment implies that which the patient receives is FAR more than the initial outlay. Which is exactly what dental treatment is.
- Best practice would be taking your patient from the surgery, showing them to a private and well furnished room, getting them a drink while they wait for their treatment plan, showing them their plan on nicely branded paper in a package along with information such as payment plans, treatment leaflets and a list of frequently asked questions. Discussing this with them and then booking them in and arranging the financial side of things.
- Is there anything your practice could be doing differently to help facilitate patients signing up for treatment?



Using educational tools, photos, videos and props

- Don't go it alone! Make sure that when you host your own consultations with patients, you come armed with a box of tricks to show them exactly what you mean when you discuss treatment.
- Your role as a treatment coordinator is not to diagnose or recommend treatment specifically, but it is to inform patients of the general treatment information that would be suitable based on their enquiry.
- To explain alone is not enough, and often as part of the dental team we take for granted how much we know about dentistry compared to the average person- therefore photos and props are essential for explaining how treatment is performed to patients, and helps to de-mystify certain areas of concern. It is our job as dental professionals to ensure that our patients understand what they are receiving, both ethically and legally.

Overcoming objections, the hard questions to handle

- There are a number of difficult questions that you might come across when handling enquiries or dealing with your own consultations, it is important to handle these professionally and confidently and also to learn from your mistakes if you make them.
- Make a note of any questions you might get that could or have flustered you in the past- and prepare responses for these ahead of time so you are never caught off guard.
- **“Why are you so expensive?”**
Don't be tempted to agree with the comment that you are expensive, respond with the statement that the treatment is an “investment” and one that the patient certainly will not regret. Don't fail to mention any financial payment plans that the practice offers- always have solutions in mind to the problems that they pose.

- **“I could go to XX and get it for half the price”**

There is a way to be diplomatic about this without sounding derogatory to where they are suggesting going. You can respond to this by saying that “i don't know the quality of the work that XX provides, however i do know the quality of treatment and experience you can expect with us, and this is absolutely relative to the cost of the treatment”

- **“Will it hurt?”**

Now, its important not to lie here! As if you tell them that is absolutely will not hurt, and it does, you've then potentially broken their trust. Instead of using words like “hurt” and “painful” you can use “sore” or “discomfort”, it's always best to use real examples for instance “my experience is that most patients who undergo this treatment tend to just take one or two painkillers the next day, and have a little soreness but this is mostly it - i will be calling you the next day to make sure you aren't experiencing too much discomfort”.

Follow up cadence

- There will always be patients who need extra time to think, and the decision making process can often take weeks or months - it is important to ensure you have an agreed follow up plan to contact patients following the initial consultation to ensure no one slips through the net.
- Before your patient leaves the practice, agree to call or message them the next day at a time that suits them.
- If you get no response after this, repeat again 2 days later, and then at regular intervals after this using different times, days and communication methods.
- If still no response after a week, send a message inviting them to another consultation with yourself to go over anything that they may be considering or thinking about, and invite them to bring along anyone who may be taking part in the decision making process with them.
- After some time has passed with no response, your last resort will be to send a "break up message" to the patient, keeping it short and sweet, asking for them to let you know either way whether they are interested in treatment, that this will be your last message and for them to get in touch if they need anything - sometimes this nudge can be enough to get a response from the patient about their intentions



End of treatment protocols

- The final chapter! What do we do once a patient has finished a course of treatment, simply let them go, book them in for their next routine appointment..... uhhh no!
- Whether they were in for a large or small treatment, a subtle change or something life changing- you need to make sure that if their experience was a good one, they are asked to share this in the form of a testimonial or a review
- There are lots of different ways that dental teams can make the most of an excited patient transformation, you can ask for a selfie with the patient, you can arrange a small photo shoot for their “after” photos (all providing they have given GDPR consent and signed a photography release form prior to treatment) you can invite them to a video testimonial day, you can present them with a small gift such as flowers or some chocolates to say thank you for being a great patient throughout, you can ask them to leave a review for you on either social media or google- or even just write it on a nice piece of note paper there and then!
- Don’t be shy or embarrassed, whats the worst they could do- say no?, put yourself in their shoes...would you mind? Most likely not! It’s quite nice to be asked for feedback
- “ Mrs Smith, i’m so glad that you’ve had such a positive experience here, i was wondering if you wouldn’t mind just sparing 5 minutes to leave us a little review so that other patients who are considering this treatment can see how positive the experience has been for others? We would really appreciate it!”
- After all, you don’t ask- you don’t get!

ACTIVITY

- After this session, please take the time to take a free online DISC profiling test for yourself, as well as preparing for yourself a cheat sheet of difficult questions and Diplomatic answers.
- What are your short, medium and long term goals going away from today?
- Is there anything you can change immediately?