

Orthodontist Are Capitalizing On A Professional
"Done For You" Follow-Up Service!

MEASURE IT... MANAGE IT... AND GET RESULTS



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Learn How And How Much Your Orthodontic Practice Is Losing By Not Having A Consistent And Effective Follow-Up Process!

The follow-up process is one of the most critical and productive steps in every sales organization, including every Orthodontic practice. However, it is the most overlooked, mismanaged, or worse yet forgotten about all together in most practices. Whether we are talking about a specialist, general practice or the dental industry as a whole, the follow-up process is always an area most offices simply don't focus on. It is not that they do not want to do better at follow-up. It comes down to two things. Most doctors, business or office managers, and treatment coordinators were never trained on the importance of having a specific follow-up process. Second, most TC's do not have, nor are they given, ample time to execute an effective follow-up process precisely.

Throughout this article, we will discuss the importance of the follow-up process, how you can improve, and what you can do to take things to the next level.

Why Is Your Follow-Up Process Crucial?

Let us take a look at what we know as it relates to starts in an Orthodontic practice. After each exam/consult, physical or virtual, one of two things will happen, convert on the spot and get a same-day start or do not convert and they become a "pending" exam.

Same-day starts automatically turn into what we call

"actual income," all others are pending exams and now become "potential income". Basic logic tells us the only way to convert someone from a "potential income" to "actual income" or a "pending exam" into a "start" can only happen by way of a "follow-up process"!When you take the time to measure and manage your pending exams, it becomes crystal clear how important having a specific follow-up process will have on your conversion rate and your practice's overall success. Engaging in TxConverter's follow-up system coupled with our follow through to a decision process provides the best opportunity at converting your pending exams.



Plus, we identify and measure your lost opportunities. Knowing whom you lost is one thing: learning why you lost them is everything!

Let's Break The Follow-Up Process Into Three Parts

You have follow-up, effective follow-up, and, more importantly, you have follow through to a decision!

1. Follow-Up



You do not want potential patients to fall through the cracks due to untimely follow-up, lack of follow-up or worse yet, no follow-up at all!

When it comes to following-up, timing is everything! As each day goes by after the initial exam with no communication, your chances of a conversion drastically diminish.

Therefore, on the other hand, follow-up efforts sooner rather than later provides you with a greater chance of a conversion while the excitement of the exam is still present.

2. Effective Follow-Up

Our definition of "effective follow-up" is designing a message regardless of the method of communication, phone call, voicemail, email, or text that generates a response from the pending exam/potential patient.

Here is an example of a follow-up voicemail message that most would feel is an acceptable follow-up message:

Hi, this is Margaret from Example Orthodontics; I just wanted to follow-up to see if you have decided yet. If you have any questions or want to get started, please give me a call when you have time.

Here is an example of a proven compelling follow-up message:

Hi, this is Margaret from Example Orthodontics. When we last spoke, you wanted to review the proposal with your husband, John. I wanted to check in to see if you had a chance to go over the details with him yet. If he has any questions, I will be happy to answer them. Also, I have some great news, so kindly give me a call when you can so I can share it with you. Thank you and I look forward to hearing from you.

The second message far outperforms the first message as it relates to responses. Everyone wants to hear the great news.



Depending on the situation and your practice's specific goals for starts the "good news" could be anything from offering priority scheduling, free teeth whitening, to a gift card offering a discount if they start by a specific date.

The bottom line is that the potential patient needs a reason with value for them to take the time to respond. Without this value, they will not be motivated to respond to you until it fits their schedule.

3. Follow Through All The Way To A Decision

At best, out of these three parts, follow-up then effective follow-up and now follow through all the way to a decision most practices do not get past the first step of follow-up. Here is why follow through (all

the way) to a decision is so vital to the success of any business let alone an orthodontic practice. Many practices spend thousands of dollars if not more on marketing to accomplish one goal: To schedule an exam/consult. In the recent past it was a physical exam, in today's world, it could now be a virtual exam. Either way, the goal is still the same, and that is to schedule an exam.

Follow-up ~~=~~ Follow-through

The two are not one in the same

Now how much is each exam worth to your practice?

If you were to put the value of (your) average orthodontic treatment plan from your practice to each exam, you will get an idea of how much each exam could be worth to your practice.

So using the example above, how much is each exam worth to your practice ? 4, 5, or 6 thousand dollars or more? (We will use \$5k as an example later)

To put things into perspective, let us take your average value of each exam _____ and times it (X) by the number of exams that you did not start in a particular month.

Let us say in a single month, your practice had 25 exams, and you converted ten into starts. This leaves fifteen exams X \$5k (as stated above) = \$75, 000 in potential income.

Can you image that figure being increased by the number of exams that you do not convert in each month going forward not to mention all of the previous months?

Not only is this a lot of money, but let us do a little exercise. Total the number of pending exams that you have from the past 90 days. Whatever that number is X (times) by either \$5k or whatever your average treatment plan amount is.

What is that dollar figure? \$_____

Whatever this dollar value is, can you imagine the return you can realize if you invested in tools, professional training, or even a done for you service focusing on your potential income?

Now, this is where "following through to a decision" becomes essential.

I get these questions a lot. How often should I keep following-up, or When should I stop following-up?

My answer is the same, keep following-up until you get a decision of

- Yes, I want to get started now
- Yes, I am still interested but not right now
- No, I am no longer interested in getting started

Most practices stop following-up WAY TOO SOON, especially if there is no response!

To the average practice, no response means not interested.

In business, this is NOT true; to us, no response means you have not given the potential patient enough of a reason or enough value to take time out of their schedule to call, text, or email you back.

(as referenced in the effective follow-up section above)

Early in this blog, I mentioned that knowing whom you lost is one thing, but knowing why you lost them is everything.

Very few practices measure or manage their losses related to why potential patients did not start with them. Some of the reasons are

- Chose another doctor
- Did not like the treatment plan
- Price too high

**IF YOU CAN MEASURE IT
THEN YOU CAN
MANAGE IT**

Why is it essential to identify the above reasons and more? If you can identify the why then you have a chance to possibly make an adjustment that may reduce your losses.

Chances are you review your financial statement (P/L), which is comprised of your profit and or loss each month. Your goal as a business owner is to identify the areas you are doing well and try to

increase them and then identify the areas you are not doing so well and reduce, if not eliminate, the loss. If you take this same business discipline and apply it to your potential income/ pending exams, you will increase your productivity!

By now, you should have a good idea of why the follow-up process is one of the most critical and productive processes in every practice within the dental industry and beyond!

If you do not have a consistent and effective follow-up process in place, you are losing more business than you think you are. Furthermore, if you are not investing in this area by providing the tools necessary for your team to be more effective due to your perception of adding more cost, you are stepping over dollars to pick up pennies.

Moreover, investing in an effective follow-up process and the right tools will provide you with the highest return!

Do not be afraid to reach out for help. TxConverter was conceived while working on the front line of an orthodontic practice for years. That is what makes us experts in optimizing the entire follow-up process from our software, TC training, Live TC coaching, and the industries first done for you follow-up program!

For more information including a free analysis (\$199.00 value) of your “pending exams/potential income” for the last 120 days by number, aging and dollar value visit:

TxConverter.com/followup

