



How to improve your case acceptance rate to increase your turnover and reduce your need for new patients

By Julie Parker

I see enormous time, money and energy being expended on marketing campaigns to attract new patients to practices in the name of business growth. Yes, every practice needs a continuous flow of new patients to replace those that are lost through patients moving out of the area, having changed financial situations and, sadly, passing away. However, if most of the treatments you suggest are not being scheduled in by the patient, a stream of new patients is not going to generate the business growth you want.

"Only 50-60% of cases are scheduled by patients of record and that figure plummets to just 25-35% of new patient cases..."

What is your case acceptance rate?

When I ask practices what they believe their case acceptance rate is, their presumption usually turns out to be a wild over-estimation of how many patients actually book in for their recommended treatment. A common figure I hear is 80%, however, if you have a hard look at the real situation, the research reveals that only 50-60% of cases are scheduled by patients of record and that figure plummets to just 25-35% of new patient cases.

✓ Advised treatment
✓ Booked

Appointment book : Dr Frank Spencer
Appointment list for : Thursday 24/11/2016

Time	Details	Status	Telephones	Class
08:00				
08:15				
08:30	#10 Janis, Mrs Katie			<none>
08:45	Dr 1,			
09:00	filling 46 45 min			
09:15	#60 Watt, Mrs Jennifer			<none>
09:30	Dr 1, Recall 30 min			
09:45	FTA			
10:00				
10:15	#1 White, Mr Fred		H.2589 9856	<none>
10:30	Dr 1,		M.0414567454	
10:45	crown prep 16			
11:00	90 min			
11:15				
11:30				
11:45				
12:00	#58 Robinson, Clive		M.0422 369 221	<none>
12:15	Dr 1,			
12:30	fillings Q3			
12:45	60 min			
13:00	Lunch			
13:15				
13:30				
13:45				
14:00				
14:15	#59 Chain, Miss Daisy		M.0422 669 852	<none>
14:30	Dr 1, Recall 30 min			
14:45				
15:00	#61 Bay, Mrs Cloudy			<none>
15:15	Dr 1,			
15:30	NP - exam, clean 45 min			
15:45	#62 Bay, Miss Summer			<none>
16:00	Dr 1, NP - 5 yr old exam 30 min			
16:15	#63 Bay, Master Stormy			<none>
16:30	Dr 1, NP - 13 yr old exam, possible clean 30 min			
16:45	#44 Howser, Mrs Heather		H.4567 7899	<none>
17:00	Dr 1,			
17:15	TA Q4 45 min			
17:30				
17:45				

The first step is to find out how many of your patients are scheduling in for the treatments you recommend. The process I suggest to my clients is to track this figure over a month:

1. Have a printed daysheet in your surgery every day for a month;
2. Place a tick beside every patient you recommend treatment for (NOT including recalls);
3. At the end of the day, go back to each ticked patient and check whether they scheduled in for this treatment. If they have a booking, place a circle around the tick; and
4. At the completion of the month, count all the ticks and count all circled ticks. This will give you your current case acceptance rate.

The example shown in the image shows that five patients had further treatment recommended to them, with two making a booking. This reveals a case acceptance rate of only 40%.

Tips for increasing your case acceptance rate

Several factors impact upon your patients' willingness to schedule in for treatment. *Do they trust and believe you? Are they clear or confused about their treatment plans? Do they have financial, time or anxiety issues?*

Building trust

As the research I mentioned before indicates, an existing patient is more likely to accept treatment over a new patient. This is because a degree of trust has already been established. Trust is built with each and every patient through:

- Providing consistent, positive experiences for them in the practice;
- Showing empathy to the patient's individual situation;
- Doing what you say and communicating clearly if things change; and
- Being honest with the patient about their oral condition and prognosis.

Building trust takes time, but there are things you can do when treating new patients to provide the environment for them to feel they are in safe hands:

- Display all your qualifications and certifications for further learning in the room where you conduct your treatment plan presentations;

- Learn rapport building techniques (please see my blog post on this for more info: <https://goo.gl/y4ak6v>);
- Become an excellent listener; and
- Be empathic and show you care.

Helping your patients understand the treatment plan

A confused patient will almost always decline to commit to treatment. However, if you spend the time to effectively engage with your patients and educate them on what you are offering, your case acceptance rate will shift into a whole different gear. It is simple, but not easy, to do this:

"An ideal goal for general services is 80% acceptance rate for patients of record and 50-70% for new patients... Improving your case acceptance rate is the quickest and cheapest way to improve your bottom line..."

- Conduct treatment plan discussions with the patient seated, preferably at a separate table with display models and sketch pad to assist the process;
- Take your time and avoid jargon;
- Discuss the benefits and value of the treatment you are suggesting (I often see just the features of treatment being presented to the patient); and
- Ask the patient to provide feedback and ask if they have any questions.

Removing patient barriers

Once a patient trusts your diagnosis and understands what has been recommended, the barriers preventing a booking being made for the required treatment are either financial, time availability or anxiety. Ensure your practice addresses these barriers by:

- Offering different financial options such as in-practice payment plans for smaller amounts and financial loans through external financiers;

- Opening early mornings, evenings and Saturdays; and
- Creating a calm, spa-like environment and using Pentrox or other medications to help highly anxious patients.

Continue tracking your case acceptance rate as you implement the above processes and hone your communication skills with patients. Depending on the complexity of your treatment plans, an ideal goal for general services is 80% acceptance rate for patients of record and 50-70% for new patients.

Improving your case acceptance rate is the quickest and cheapest way to improve your bottom line. It also builds practice sustainability and improves your relationships with patients.

Including communication training in your list of education courses to complete every year is one of the best steps you can take towards building the practice of your dreams.

About the author

Julie Parker's whole career has been devoted to the dental industry, starting in 1987 as a dental nurse. In 2003, Julie became the first non-dentist to buy a dental practice in Australia. She owned and managed her practice in Brighton, Victoria for 10 years. During this time, she more than trebled the turnover and her staff base grew from 3 to 12 members. Julie successfully cultivated a winning team and a winning business. Her business programs on how to accomplish a dream dental business are gleaned from her wealth of experience, intensive education and an inquisitive business mind. Julie is a Certified Practitioner of Neuro-Linguistic Programming, Time Line Therapy and Hypnotherapy.

Julie Parker Practice Success offers a subscription based program that educates all dental staff in the building and managing of their practices. Members receive monthly audio CD's and workbooks that lead them along the path to personal and team success. All team members, including the dentists, receive Certificates of Completion each month for submission for non-clinical CPD points and inclusion on resumes. Memberships are available for \$395 per month. For more info, see www.julieparkerpracticesuccess.com.au.