

PRESENTING FINANCIAL CONSULTS ASSIGNMENT

Let's look at another example.

A patient comes to your practice because she knows you offer adult orthodontics. The patient reports that she never smiles for family photos because she is embarrassed about her crooked teeth.

What would be "the BEGINNING" a team member should say to this patient when sitting down to review financial arrangements?

What would be "the MIDDLE" a team member should say?

What would be "the END" a team member should say?

We like this: "I'm sorry to hear that you don't smile for family photos. The good news is that we can give you the smile you've always wanted with Invisalign. With clear, removable aligners, Invisalign will straighten your smile in about a year. This time next year you will have the BIGGEST smile in your family photos."

See that? We've very easily been able to address the BEGINNING, MIDDLE, AND END concept for that patient. What do you think would be more effective when presenting financial arrangements? Simply stating a fee? Or taking a few minutes to build value with the BEGINNING, MIDDLE, and END concept?

The time to review the financial form is AFTER the value building conversation. If the financial form is given to the patient before the value building conversation, quite frankly, the patient will not hear anything being said. They will be too focused on the numbers. So, have the value conversation first. Use those few moments as an opportunity to look the patient in the eye and have them feel your compassion, kindness, and confidence. Then, take the form out and review the payment options with them.

It is a great idea to practice financial consults on team members before going live on patients. Patients will not feel confident in the practice if the person reviewing treatment and financial options is not confident.

Date of completion:

Reviewed with doctor/manager:

Initial after satisfactory completion: