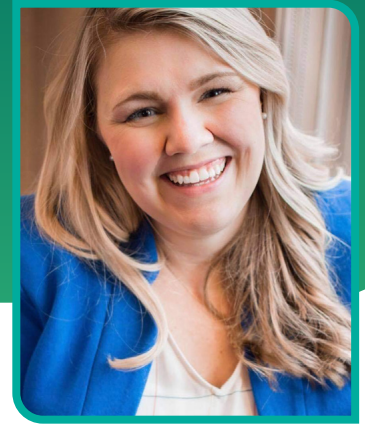


Growth Strategies: Don't Let Potential Production Sit Idle in Your Charts

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Helping patients maximize their dental benefits is the goal for many practices the second half of the year, specifically August through December. Developing an effective and efficient end-of-year recall strategy, though, begins now. Many aspects of practice management are evolving at a rapid pace. That's why it's so important to analyze previous recall efforts and clearly define what worked and what didn't so that you build upon success. Here are a few proven strategies to consider as you kick off [end-of-year recall](#).



Block Your Schedule for Hygiene

Today, many practices may be looking to fill open positions, especially for hygiene. This may make year-end scheduling particularly challenging as many patients will want to take advantage of their benefits. The last thing you want is for a patient to want to return for hygiene or incomplete dentistry and end up not having a time available. Strategically blocking your schedule for same day dentistry, past-due treatment and past-due hygiene may help keep the team aligned and the schedule full.



Gather Your Information

First, do your homework. You want to have all the information you or the patient may need to help move them forward to treatment. To identify patients who need to be invited back to the practice, run the incomplete and past-due hygiene reports from your practice management software. Then identify available insurance benefits that may expire by end of year. Another report to consider pulling is CareCredit's [Cardholder Available Credit Report](#). This will tell you if the patient is an existing CareCredit cardholder and the available credit that can be used for out-of-pocket costs. Armed with this information, you can present a comprehensive financial solution to patients.



Make the Call (or Text*) Early

In your patient files should be two key pieces of information: their contact method with **written permission** to use it and their preferred appointment days/times. In today's world of AI and automation, it's important that the communication sounds personal and friendly. If you're using a software program to send texts or calls, make sure it does not sound robotic by using their preferred name.

Once you've identified patients for whom you have written permission to send recurring marketing texts, proactively reach out as early as possible to get them on the schedule. You know there are going to be patients who will wait until last minute, so try to get as much of the schedule filled, especially in November and early December.

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First, text the patient (if their file indicates it is their preferred contact method and you have **written permission** to send them marketing and appointment reminder texts).

Text: Hi Jen. I noticed you have benefits available to use before the end of year. Our schedule fills up early and we'd like to help you secure an appointment before your benefits expire.

Then about 7 days later, give them a call.

Call: "Hi Jen (preferred name), it's Sara from doctor's office. I noticed you have benefits available."

Pause and let them respond, which often is, "What do mean?" Then explain.

"According to your file, you have benefits that will contribute to the cost of the dentistry doctor recommended. As we discussed, with your insurance that leaves \$850 as your portion to pay. We also noticed that you have a CareCredit credit card you may be able to use, which offers promotional financing on purchases of \$200 or more. We still have next Tuesday at 3pm and Friday at 10am available. Which would work best for you?"

If the patient is not ready to commit to an appointment, offer to put them on a VIP call-back list to let them know of any last minute changes in the schedule.

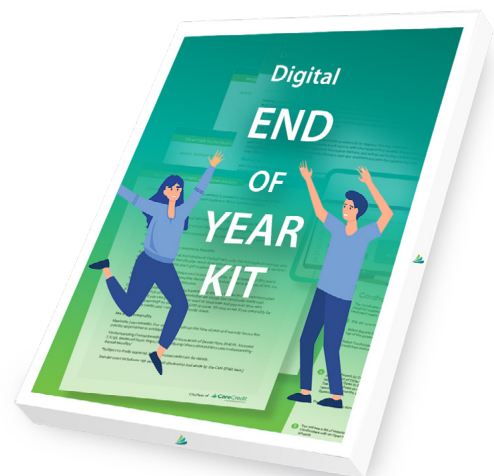
Educating, empowering and enabling patients to maximize their dental benefits so they can enjoy a healthy and beautiful smile not only makes for happy patients but also a healthy practice.

JENNIFER STEADMAN'S CAREER HAS TAKEN HER ON A JOURNEY FROM DENTAL ASSISTANT TO HYGIENIST, PRACTICE MANAGER, DIRECTOR OF OPERATIONS OF A MID-SIZED DSO, TO DIRECTOR OF OPERATIONS FOR INSPIRED HYGIENE. IN 2020, SHE WAS NAMED AADOM'S PRACTICE ADMINISTRATOR OF THE YEAR.

ACCESS MORE RESOURCES

DOWNLOAD YOUR END OF YEAR DIGITAL KIT featuring ready-to-use patient emails and social media posts.

DOWNLOAD DIGITAL KIT



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