

# Scheduling for Success

**Amy Kirsch**  
**Amy Kirsch & Associates**  
[www.amykirsch.com](http://www.amykirsch.com)  
**303-706-0056**  
[amy@amykirsch.com](mailto:amy@amykirsch.com)

## Developmental Levels of a Dental Practice

### Level One: Chaos

- Doctor is doing \_\_\_\_\_.
- Staff are doing \_\_\_\_\_.
- Systems are \_\_\_\_\_ or \_\_\_\_\_.

### Level Two: Organizational

- Staff and Doctor have a \_\_\_\_\_ and are developing and organizing the practice systems.
- Staff are \_\_\_\_\_ the systems.

### Level Three: Managerial

- Doctor is \_\_\_\_\_ the staff.
- Staff are \_\_\_\_\_ the systems.
- The emphasis is \_\_\_\_\_.

### Level Four: Leadership

- Doctor is \_\_\_\_\_ the staff.
- Staff are \_\_\_\_\_ the office.
- \_\_\_\_\_ defect management.

## 11 Steps to Scheduling Success

### 1. Morning Huddle

- Yesterday's schedule: (what went right and what went wrong)
- Today's schedule: (any problem areas)
- Emergency and catch-up time:
- Next available start:
- New patient information:
- Financial Information:
- Clinical data: (problem patients or procedures)
- Marketing Information:
- Motivational statement:

### 2. Determining the Annual Production Goal

- How many \_\_\_\_\_ per month will it take to meet your goals?
- How many clinical \_\_\_\_\_ do you have available to see patients?

### **3. Create the Ideal Day Scheduling Template**

- Develop a detailed procedure list
- Time all procedures a minimum of three times
- Short appointments
- Long appointments
- Records
- Adjustments
- Consultations
- Starts
- Tough patients and tough cases
- Emergencies
- New Patient Exams
- How many clinical team members do you have?
- How many clinical chairs do you have?

### **4. Create alternate templates for June-August, school vacations, start of flex plans**

### **5. Start the day \_\_\_\_\_ to stay on time**

### **6. Scheduling \_\_\_\_\_**

### **7. Use \_\_\_ minute increments**

8. Book long procedures during the first \_\_\_\_\_ hours of the day.
  
9. Start with the \_\_\_\_\_ times of the day.
  
10. Confirm appointments by \_\_\_\_\_.
  
11. Communicate your scheduling \_\_\_\_\_.

## Great Scheduling Communication Skills

### 1. Productive / long and difficult procedures:

"Mrs. Jones, because this is such an \_\_\_\_\_ procedure, Dr. Dietmeier prefers seeing Amanda in the morning. I have an opening on Monday at 8:00 or Wednesday at 9:30. Which one will work best for you?"

**Avoid:**

"We always do bandings in the morning because Dr. Dietmeier is fresher."

"We only do these kinds of appointments in the morning."

### 2. Offer patients the difficult times of the day first:

"Robert, we have an opening for that appointment on Tuesday at 10:00 or Thursday at 12:30. Which one will be better for you?"

### 3. Controlling the schedule by offering choices:

"Mrs. Jones, Dr. Dietmeier would have time to do that procedure on Monday at 1:00 or Tuesday at 2:20. Which one would work better for you?"

**Avoid:**

"What time will work best for you?"

"Is there a day or time of the day that works best for you?"

"When would you like to come in?"

#### 4. Killer words!

<u>Avoid:</u>	<u>Say Instead:</u>
Cancellation	
Policy	
No	

#### 5. Emergency treatment and placement:

“Mrs. Jones, thank you for calling and letting us know about Sam’s broken bracket. For any patients with a broken bracket or repair, we have time at 11:00 or 2:20. Which one would work best for you?”

“Michael, I see you have a broken bracket today. We will be able to go ahead and repair that for you today. However, so you will not have to be here as long next time, please call our office ahead of time so we may schedule a separate appointment for you.”

#### 6. Confirmation calls (2 days in advance):

**Personally talking with the patient or leaving a message:**

"Mrs. Jones, this Amy at Dr. Dietmeier’s orthodontic office. I was calling to let you know we are looking forward to seeing you on Tuesday at 9:00."

**Avoid:** Confirming, reminding or leaving your phone number

### **7. Short cancellation:**

"I am so sorry you will not be able to keep your two hour appointment with Dr. Dietmeier today. I know he was looking forward to seeing you. Is there anything I can personally do to help you keep this appointment? I will let Dr. Dietmeier know right away. As you know, normally we request 48 hours notice in case you need to change an appointment. Since this is the first time you have changed an appointment on short notice, I will go ahead and waive the \$50 fee. How does next Tuesday at 9:00 or Wednesday at 10:00 sound for you to reschedule your appointment?"

#### **Avoid:**

"Oh, that's O.K. Do you want to reschedule?"

"We reserved that time just for you. I will not be able to fill it with this late notice."

"I will put you on our cancellation list."

### **8. Second last minute cancellation:**

"I will let Dr. Dietmeier know you are unable to see us today. As you know, we kindly request 48 hours notice in case you need to change your appointment. We have reserved this time just for you and we would love to offer that time to another patient who needs care. I know you have a busy schedule. I will check with our Office Manager to see if there will be a broken appointment fee for today. Let's go ahead and reschedule your appointment. Unfortunately, I do not have an opening for 4 weeks. I will also put you on our Priority Call List. You can also call us when you know you will definitely have the day off or the time to come see us."



## 9. Phone message:

"Thanks for calling Dr. Dietmeier's office. We are out of the office until Tuesday at 8:00 am. If you are having an orthodontic emergency and are a patient of record, you may reach Dr. Dietmeier at 303-796-0620. If you are calling to reschedule an existing appointment, please keep in mind we kindly request 48 hours notice or two business days to reschedule any appointment. Thank you for calling."

## 10. Late patients

"I am so glad you are here, Teddy. Dr. Haltom was worried about you. Let me let him know you are here so they can see what we can do today."

## 11. Customer Service Skills

- "I wish I could...."
- "I would love to be able to....."
- "Dr. Haltom asked me to call you."
- " \_\_\_\_\_ "
- " \_\_\_\_\_ "
- " \_\_\_\_\_ !"

## WOW New Patient Telephone Call

### 5 Key Communication Skills

1. Good morning, Dr. Haltom's office. This is Amy. \_\_\_\_\_?
2. How long has it been \_\_\_\_\_ have seen Dr. Haltom?
3. Whom may we thank for \_\_\_\_\_ you to our office?
4. So I may properly appoint you, may I ask you a few questions?

### Additional Telephone Skills

1. Have you been to our website yet? It has the New Patient forms for you to print, complete and bring to our office as well as directions to the office.
2. Will we be filing any dental benefits for you? Do you mind giving me that information? I would be happy to do a complimentary benefits check for you.
3. Welcome to our practice! You will love Dr. Haltom. He is a great orthodontist and our patients and parents really like his down to earth personality and his sense of humor. He will be able to answer any questions you may have at the first appointment.
4. Is there anything else you feel we need to know before we see you and Tim next week?
5. Dr. Just sends us the nicest patients. We work very closely with her office.

## Orthodontic Scheduling Communication Skills

1. "Why can't you just fix that bracket while we are here today?"
2. "I don't want to take Susan out of school for an orthodontic appointment."
3. "I would like to schedule all my child's appointments for 4pm."
4. Patient arrives 15 minutes into their appointment and now you will not have enough time to complete all treatment scheduled.
5. You realize the patient has 2 broken brackets.
6. Your 9am patient has missed the last 2 appointments. What will you say to them so they will realize the importance of keeping their appointments?

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7. Your schedule is extremely full on late afternoons and you do not preappoint non-compliant patients (patients that have shown to be irresponsible in the past). One of these patients would like to pre-appoint for their next visit for a 4:30 pm appointment.
  
8. Patient says, "I'd like an evening or weekend appointment."
  
9. Patient calls first thing in the morning and has a bracket off. The mother gets off work at 4pm and would like to bring the child in then. You have pre-blocked emergency time at 10am and at 1pm.
  
10. Patient calls to cancel one hour before their banding appointment. Try to get that patient to still come in for their appointment.
  
11. It is 4pm, your 8am new patient for tomorrow tries to call and cancel their appointment. What would you say to them?

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12. You have two openings (each one hour) in tomorrow's doctor schedule. You need to call patients with delayed treatment to try to fill the holes. The first patient you call needs an arch wire change and their "hot button" is time.

13. A patient checks in at the front reception area and you must tell them you are running behind 20-30 minutes.

## About Amy Kirsch

Amy Kirsch is a nationally known dental practice management speaker and consultant and one of the Founders of the International Institute for HealthCare Businesses. For over 20 years, Amy has provided customized consulting services and training for dentists and their teams on topics including practice analysis, leadership training, scheduling for success, internal marketing, customer service skills, cash flow analysis, effective communication skills, hiring for success, and new owner success.

Amy has been a dental assistant, office manager, and a dental hygienist and brings her clinical, management, and dental consulting experiences to her presentations. Amy is the publisher of “The High Performing Dental Practice” training series. Amy is a member of the Academy of Dental Management Consultants and the American Academy of Cosmetic Dentistry. She has been a Senior Dental Consultant with the Pride Institute for seven years, an Associate Professor at the University of Missouri Kansas City, a Visiting Faculty Member of the L. D. Pankey Institute and is a Clinical Assistant Professor at the University of Colorado School of Dental Medicine.

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