Perfecting your patient journey and reaping the rewards

Dental therapist **Karenn Helmrichne Davila** and dentist **Dr Ben Atkins** share their comprehensive tips and advice on patient care and upselling, for newly qualified dental professionals.

If you have just graduated, you will be thinking about the first steps in your career as a newly qualified dental hygienist and therapist, such as your working life and of course your earnings. Patient care comes first and foremost of course, but we must also think about running a business and having a successful career.

Recent times have been hard for everyone, especially for us as dental professionals. It can be daunting to suddenly step into work, become fully responsible for your patients, up sales and down sales and on top of that wear very different personal protective equipment (PPE) due to COVID-19.

Ben and I have written this article thinking of you, the final year students, freshly qualified dental therapists, dental hygienists, vocational trainees (VTs) and any other professionals who might find our tips useful. We hope that this piece will give you some level of understanding of the basic, yet essential features of patient care and upselling.

Ben has extensive knowledge on sales, vocational training and has had a long, successful career. I have extensive clinical experience as a dental therapist and a flourishing career; we aim to provide you with the ultimate approach to blooming patient care and booming sales.

Our protocol is designed to help you to gain and improve on your confidence as a clinician, and develop your people skills. It has already been tried and tested on dental therapists in vocational training, with excellent results.

The protocol

Give yourself at least three months (six months or a year would be better), so you can truly assess the outcome of your clinical practice, monitor your progress and up sales.

Before applying this protocol, take note of your current patient journey from the moment you meet the patient up to the point that they leave your surgery; don't forget to write down a reflection on it. Be thorough and

honest. This will help you to compare your old and new ways of treating your patients and learn from your own transformation.

Next print several copies of the 'Tracking sheets & Patients' views' pages included with this article and make your own portfolio.

It's important to work together with your colleagues on this, as teamwork plays an important role in a patient's journey.

Aims

Before we begin, we must not forget the formalities.

The aim of this article is to:

1. Increase the quality of the services provided to patients
2. Increase sales of private services (eg tooth whitening, aesthetic bonding, periodontal maintenance, etc)
3. Enjoy the patient journey.

Learning outcomes

At the end of this process, you will be able to:

1. Complete each patient appointment in the

same manner. This will be demonstrated by the fact that you have inspected and completed your own work. You will then be able to spot any area of weakness and rectify it.

2. Demonstrate that your patients are satisfied with the service provided
3. Increase the number of private aesthetic treatments completed by yourself, with self-referrals.

Targets

Do a monthly report using your Tracking sheets [see note at the end of this article].

At the sixth month do a patient survey to gain feedback on patient satisfaction. This will help you to monitor your level of progress and of course will help you reflect on your patient-care skills. For the survey, ask the reception staff at your practice to distribute your feedback sheet to your patients right after the patients have seen you.

Top tips: meeting and greeting

Some of the following tips may seem rather basic but they are invaluable.

1. First impressions are extremely important – it is far easier to deal with a patient if you can quickly establish rapport. It is important that you project complete confidence in yourself. You must feel and act happy and confident to take care of your patients at all times. This relaxes the patient and gives them confidence in you, their practitioner. If you don't feel confident in your ability to deal with your patient, FAKE IT. Practice make perfection!
2. Professional appearance is as important as inner confidence. It projects your personality and your professionalism. Ensure you look presentable, fresh, clean and well groomed. Make-up has its place but too much can give the wrong impression to your patients. It is worth investing in good quality uniforms as you will be wearing them for most of the day, so you should wear something that you like, are comfortable in and that is in fashion, as appropriate.
Extra tip: if you have any badges/pins from any awards that you have received or from supporting charities/seasonal events, wear them! This will give you credibility and something to talk about with your patients.
3. The clinician **always** goes and collects their patient. This instantly suggests a personal interest in your patient, showing you care. Doing this also reduces the length of the appointment and frees up your nurse to be doing all jobs they don't have time for.

[However, in the current COVID era, collecting your patient does depend on practice protocols. So, protocol may dictate that the dental nurse collects patients at the entrance and brings them into the surgery.]

4. Before you meet your patient, make sure you know their name. Only use Mr, Ms, Doctor or Professor, **never** ever call them by their first name. This shows respect for the patient; this respect and politeness will make your patient relaxed, respected and comfortable. It also gives the patient more control.
5. Make as much eye contact with the patient as possible and be confident. Eye contact means more than you think. It is the beginning of a respectful relationship between patient and clinician. A mutual gaze is a sign of acknowledgement, interest and acceptance, and therefore a pleasant meeting. A pause in or only occasional eye contact can show low confidence and uncertainty. The complete lack of eye contact suggests, simply, no interest. In patients' minds this could be worrying and make them nervous. This is the last case scenario you want to be in. Additionally, in some cultures, eye contact is a sign of respect.

time you told your nearest and dearest you loved them? As a nation we often concentrate on the negatives. I know that in my recent 360-degree appraisal by my team I was criticised for not saying 'thank you' enough. I have realised that I really enjoy saying thank you.

'Thank you' is a key word, a polite act of expression that will help you to build up patients' confidence. You might be surprised how powerful small gestures can be. They might change the whole dynamic of your appointment – for the better.

8. Shake hands with the patient. If you are not used to shaking people's hands, then practise. The aim is to have a firm but gentle handshake which is friendly. Your hand should be under the patient's hand, putting the patient's hand on top, in the dominant position. This way you are making the patient feel that they are in control of the situation, which is one of the ways to make the patient feel comfortable. Consider this for post-COVID era, as currently, unfortunately, we cannot do this.
9. In a non-COVID era, you would ask 'can I take your coat' but sadly we cannot do this, these days. So, politely point out the location of the coat hanger and offer the patient a space to place their belongings.

'Make as much eye contact with the patient as possible and be confident. A mutual gaze is a sign of acknowledgement and acceptance.'

However, eye contact can be intimidating for some [I have added some links at the end of this article to learn more about eye contact as well as some tips and tricks].

6. Smile, you are trying to make the patient feel that you have nothing but them to concentrate on. This will also help you to start building trust and patient confidence. You know what they say: a smile buys you anything! With full PPE on, this might seem impossible, but don't forget, you also smile with your eyes, 'Smize'.
7. Introduce yourself: 'My name is..., I will be caring for you today' (the more you say to someone who you are providing care to, the more they understand and develop confidence in you). It sounds weird but when was the last

Often patients arrive in a rush, nervous and worried; allow them to take their time, don't rush them. This will help them to acclimatise and catch their breath.

Look for something positive to comment on. My favourite moment is when my nurse compliments the patient on their perfume, shoes etc and this takes the job from me. You are in a team and you need to focus on this.

10. Inform the patient where they are going to sit. This seems obvious but if you ask the patient just to take a seat then this can give the patient doubts and increase nerves. How many times have I heard clinicians asking their patients to take a seat without pointing towards the dental chair, and the patients sits on the wrong chair? It does

happen... don't let this be you!

Remember you need to be in control of the room but making the patients feel like they are. Make light of it: 'jump onto the big chair'; guide them to the dental chair.

11. The end of the greeting process: as an opening statement, ask the patient why they are there: eg 'So Mrs Philips, why did you come to see me?' Or 'What can I do for you today?' or 'Any concerns about your gums or teeth?'

I remember asking this last question to one of my patients soon after I qualified, and I followed it by saying 'I should have all the answers by now, I just qualified'. Ha, this was a cracker, the patient laughed like there was no tomorrow - a good way to break the ice!

care as well as recall appointments.

It is really important for you to involve the patient in the whole process, so that they know and feel that they are in control and included in the decision making.

For this process you should be in front of the patient with the patient in the upright position; keeping the patient in the upright position increases their comfort in the treatment. It also helps them to feel in control and not have any feeling of terror when a dental professional is peering over them!

Answer any questions: this is the time that you start planting the seed of how important the work you do is. This process is part of the selling process and makes the patient want to see you more regularly. You are understanding

In many of my cases, patients have said themselves:

'This is the first time I have really got my money's worth in a dental hygienist appointment'

'This is better than a dentist appointment, you did sort out my problems'

My favourite is: 'Can you do those treatments for me?'

Those comments are what you really want to hear in your day to day practice; this is upselling!

The treatment

Making sure that the patient is in the correct position is really important, but ensure that you are also comfortable - remember we do not want to develop musculoskeletal disorders (MSDs).

Explain to the patient that you will stop if they raise their left hand. You are putting the patient in control, again demonstrating you care and are listening to them. If they are really nervous get them to demonstrate this.

Before start working in the patient's mouth, make sure you explain what are going to do, using bullet points.

For example: I will provide local anaesthetic (LA); place the rubber dam; start work and remove the rubber dam for polishing the filling.

Or: I will start by cleaning your teeth with different instruments; check interdental aids; provide further stain removal; and you can have a rinse anytime you want.

The above points are particularly important for nervous patients. All you want is to plant confidence seeds in your patients, so this step-by-step guide will do just that.

Continually talking through the process with the patient makes them the centre of attention. Be proactive, as your work through; talk to them about your clinical findings, and give advice on how to improve. Let's say there is gingival inflammation involving the operculum. Advise the patient on what you see in simple terms, how can they keep it clean and why it is important to keep the area clean. This will save you time and will make you look knowledgeable, plus they will feel like their money is well spent.

Under no circumstances let yourself be interrupted. If someone else enters the room and asks to speak to you there and then, ask the patient that you are working on if they mind stopping and inform the member of staff you will come to the desk after this patient.

Full mouth debridement should take no shorter time than 15 minutes. Depending on the length of your appointment, 20 to

'One of my aims for my business is for our patients to understand their mouths; this increases their awareness and control in a situation.'

Introduction of the service

Does your patient understand why they have come to see you? One of my aims for my business is for our patients to understand their mouths; this increases their awareness and control in a situation. I have also realised that the more patients know about the normal healthy state of the mouth, the more they wish to improve and perfect their smiles. Hence more sales.

Do a lesson plan, because like it or not you are the teacher. Something along these lines...

Today we will be discussing:

1. What you want from us?
Using the word 'want' is really important as you are competing with the wants rather than the needs. The patient *needs* a car but they *want* a Ferrari.
2. Assess your teeth and gum health
Use professional yet clear words, this will enhance patient interest and make them listen to you.
3. Upon the assessment, make a treatment plan
4. Discuss anything you want to improve
5. Find the perfect way for you to keep your teeth and gums clean at home and hopefully keep your teeth for longer. When you say 'keep your teeth for longer' they will understand the importance of oral

the areas the patient is most concerned about and showing them how keen you are on helping them to achieve this.

Give the patient the mirror and ask them:

1. Where are the stains you are most concerned about?
2. Are you worried about this broken tooth, any pain?
3. Do you experience any sensitivity from the teeth with gum recession?
4. Where do you struggle cleaning?
5. Is there anything you would like to discuss about your teeth while you are here?

Remember to make sure the patient understands you are listening, demonstrate this by:

1. Leaning forward
2. Concentrating on them
3. Repeating back to them what they have said; use sentences like, just let me recap, did I understand you correctly?

Showing someone you have listened is the most important thing you do every day; it makes the patient understand you care.

It gives great satisfaction when you solve a patient's problem and this results in the patient feeling they have received good value for money.

25 minutes should be enough to do a high quality job.

Demonstrate to the patient that you have taken the time to meticulously do the debridement - apologise for taking so long to demonstrate value for money.

NEVER finish early with the patient's treatment. You can save time by collecting the patient yourself, putting their coat on etc - NOT by treating them quickly.

When it comes to stains, although we wish to remove them all, explain to the patient that it might not be possible, and offer other treatment options, such as air flow and/or tooth whitening.

As for dental restorations, make sure your appointments are booked with the correct time, to allow time for finishing touches. Aim for perfection, showing patients that perfection takes time.

At the end of the treatment, always give the mirror to patient, to ensure they are happy and to show that you care for them.

Prevention

Demonstrating oral hygiene to a patient sometimes feels like banging your head against a brick wall; however, you will be really surprised to learn that most patients have never been shown how to clean their teeth correctly. You are looking to make the patient understand that:

1. You care for their mouth
2. You want to pass them information about how to take care of their teeth, getting the message over that you want to help them
3. You take pride in your work and want to prevent them having fillings.

Give them some tips about saving money. You really want to make sure they understand that you are not selling them products. You can also give them toothpaste samples suitable to their needs and interdental brushes. Or write down what they need on a sticky note. This shows that you really want to help them to improve their oral health.

Closing

Basically, you are going to ask every patient to book the next appointment. You will find yourself in the referral process.

This is the time to set recall appointments. It is the time in which you have to make sure patients understand the importance of the next visit; this might be one-hour perio, class II composite build up, in-house tooth whitening, you name it.

So, instead of asking if they want to rebook, you will explain why they need to rebook and the benefit of having the next

treatment. Ensure that your advice is based on their specific needs and no one else's.

Most of my patients ask me when they need to come back for the next treatment, which is the outcome you really want.

If for some reason, patients do not wish to rebook, well, give them a leaflet and explain that they can book in whenever they want and send them on their way.

Remember there is always the next patient. Keep smiling, take pride in your work and get ready for the next case.

Use this method for every case: be meticulous in each step of the appointment, and repeat!

Over to you

Well, there you have it, all of our top tips, and now it's down to you. With all of our hearts we hope that these protocols help you to improve your clinical skills, increase your sales and give you the confidence to be the best dental professional you can be.

We are more than happy to help you with any questions you may have. You can follow us on Instagram, @dentalben and @smileofpearls.

Useful resources

1. Jarrett C. The Psychology of Eye Contact, Digested. The British Psychological Society. Research Digest. 28 November 2016. Available at: <https://digest.bps.org.uk/2016/11/28/the-psychology-of-eye-contact-digested/> (accessed October 2021).
2. Jiang J, Borowiak K, Tudge L, Otto C, von Kriegstein K. Neural mechanisms of eye contact when listening to another person talking. *Soc Cogn Affect Neurosci* 2017; **12**: 319–328.
3. Lasagna C A, McLaughlin M M, Deng W Y, Whiting E L, Tso I F. Deconstructing eye contact perception: Measuring perceptual precision and self-referential tendency using an online psychophysical eye contact detection task. *PLoS One* 2020; doi: 10.1371/journal.pone.0230258.

Tracking sheets & Patients' views

The authors have provided six tracking sheets for *BDJ Team* readers to use in conjunction with reading this article. These are available as supplementary information via the links to the right of this article (PDF format).

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