



Dr. Dean C. Bellavia's A~D~D~I~C~T Your Patient-Centered TC Programs

Create your Exceptional New Patient Exam/Consult

System's Responsible Persons: TC (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic **A**nalysis Time Frame: 3 weeks to gather one year of statistics, calculate the conversion rates, and evaluate your TC

Realistic **D**ecision Time Frame: 2 weeks for DR & TC to analyze the statistics and decide which design components to use

Realistic **D**esign Time Frame: 3-4 weeks to design the Exam/Consult procedures.

Realistic **I**mplementation Time Frame: 2-3 weeks to practice your exam/consult design on patients

Realistic **C**ritique Time Frame: 1 hour at the end of each month for 3 months

Realistic **T**weaking Time Frame: 2 weeks to modify and implement any design changes made after *each* critique

Analyze: Your TC program's conversion rates, referral basis and TC's abilities:

- ☐ **Exam Conversion Rate** = $(\text{Full} + \text{Ph-I} + \text{LIM} + \text{INV Starts}) \div (\text{Total Exams})$
If over 75%, great, if not, you need to improve your New Pt. Exam/Consult.
- ☐ **OBS Conversion Rate** = $(\text{Starts from OBS}) \div (\text{Exams Placed on OBS})$
If over 65%, great, if not, improve your OBS control system.
- ☐ **Ph-I/II Conversion Rate** = $(\text{Total Ph-II Starts}) \div (\text{Total Ph-I Starts})$
If over 75%, great, if not, improve your Ph-II Starts system.
- ☐ If your **Patient/Family Referrals** are over 50%, great, your TC is doing a good job. If not, you need to improve your TC programs or you need to get better DDS Referral statistics.
- ☐ If **too few exams** you need better marketing
- ☐ Use your TC's "Hiring Questionnaire" (mental skills and personality) results to determine her strengths & weaknesses.

Decide:

- ☐ Whether your *present* TC is naturally inclined to do well after evaluation of her strengths and weaknesses
- ☐ Whether you need to look for a new TC (if so, see **A~D~D~I~C~T** your **Team Organization & Hiring Systems**)
- ☐ Whether or not to use the "New Pt. Experience Kit" to speed up your design and implementation
- ☐ Whether to use "The Other Book...on orthodontics" to design your TC programs

Design:

- ☐ Use the "New Pt. Experience TC Programs Kit", books, your consultant, or your own experiences to *design* your exceptional new patient exam.
- ☐ Practice your procedures, raps, etc., and make any design changes that work better.
- ☐ Design your New Pt. Exam first and your Tx Consult after the Exam is working well for 3 months.
- ☐ If changing your Exam/Conference room to be more "sales-friendly" see below

Implement:

- ☐ Your newly designed New Pt. Exam first, by choosing a starting date to work with patients.
- ☐ Your newly designed Tx Consult after the exam is going well, by choosing a starting date to work with patients.

CHECK OFF THE BOXES OF THE STEPS YOU HAVE COMPLETED



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Critique:

- ☐ If used, refer to your "Video Design Workbook" to make sure that all of your design criteria were implemented.
- ☐ Are your Exam, OBS & Ph-II/I conversion rates better?
- ☐ Are you getting more patient referrals?
- ☐ What isn't working well and why?

Tweak:

- ☐ Clean up any of the problems noted in your critique above and implement those changes.
- ☐ Make the necessary changes in your exam and consult designs to better convince the patient that your practice is the only one they should want treatment at.

To *enhance* your TC procedures refer to the following pearls:

- ☐ TC Pearl: **Selling Your Orthodontics:**
- ☐ TC Pearl: **Getting the doctor into and out of the exam on time**
- ☐ TC Pearl: **Negotiating acceptable financial agreements**
- ☐ TC Pearl: **Dealing with transfer patients**
- ☐ TC Pearl: **Getting the "forgotten" started**
- ☐ TC Pearl: **Making your Tx Fees more acceptable**
- ☐ TC Pearl: **The records fee dilemma**

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