How to Achieve 5-Star Customer Service
And What Practices Need to Do to Get There

Roger P. Levin, DDS

The Four Tiers of Orthodontic Practices

Tier 1
Top 25%

Tier 2
Above-Average 25%

Tier 3
Below-Average 25%

Tier 4
Bottom 25%

The Four Tiers of Orthodontic Practices

Tier 1
• Top 25%
  • Low and declining production
  • Low or declining referrals
  • Low and erratic income
  • Very low or no retirement savings
  • Uncertain future

The Four Tiers of Orthodontic Practices

Tier 3
• Below-average 25%
  • 25th - 50th Percentile
  • Slightly below-average production
  • Slightly below-average referrals
  • Steady below-average income
  • Adjust lifestyle accordingly
  • Erratic retirement savings
  • In danger of decline

The Four Tiers of Orthodontic Practices

Tier 2
• Above-average 25%
  • 50th - 75th Percentile
  • Above-average production
  • Above-average referrals
  • Steady above-average income
  • Slightly erratic retirement savings
  • Inconsistent marketing - sometimes playing catch up

The Four Tiers of Orthodontic Practices

Tier 4
• Bottom 25%
  • 0 - 25th Percentile
  • Low and declining production
  • Low or declining referrals
  • Low and erratic income
  • Very low or no retirement savings
  • Uncertain future
The Four Tiers of Orthodontic Practices

- Very-high production
- Very-high referrals
- High case acceptance
- Excellent to outstanding income
- Excellent to outstanding retirement savings
- Highly consistent innovative marketing and marketing coordinator
- Excellent management systemization

Tier 1
- Top 25% (+25% – 75th Percentile)

The New World of Orthodontics

The New World of Orthodontics - Facts

- Expansion of DSOs
- Penetration of PPOs
- Overtax of Dentists
- GPs and Aligners
- Student Loan Debt
- Direct to Consumer Sales & Stores
- Retirement for ‘Years Later’

The New World of Orthodontics - Results

- Increased Competition
- Slower Practice Growth
- Fewer Referrals per Source
- Increase in Shopping
- New Perspectives on Ortho Fees
- More Hesitant Buyers
- Need for Advanced Training in All Positions

The 3 Keys to Sustaining Practice Success

1. Building a Superior Culture and Team
2. Management Systems to Increase Production
3. Marketing Strategies to Increase Referrals
The 3 Keys to Sustaining Practice Success

Is Ortho an Easy Business?

Marketing

Culture

Systems

Success

The 3 Keys to Sustaining Practice Success

Marketing to Increase Referrals

• More competition than ever before
• Need 5 areas of marketing
• Need consistent broad marketing
• Need Marketing Coordinator

Marketing to Increase Referrals

1. The Branded Patient Rewards and Referral Program
2. The Parent Ambassador Program
3. The Social Media Interface
4. The Referring Doctor Driver
5. The Full-Awareness Community Program

Branded Patient Rewards & Referral Program

▶ Drive a theme (Brand)
▶ Create leading edge “with-it” images
▶ Impress parents
▶ WOW kids - atmosphere of fun

The Parent Ambassador Program

▶ Parents are the real referral source
▶ Make parents feel they are part of the practice
▶ Rewards, gifts, lotteries, fun
The right strategic online participation
The right formula
The right message
The right platforms

The Social Media Interface

The Referring Doctor Driver
Beyond lunches
15 Strategies
Multiple activities in multiple categories
Marketing Coordinator
Value-added relationship building

The Full-Awareness Community Program
Branding
Exposure
Charitable
They assume they will come to you

Google Review Cards
Thank you cards
10-Minute new patient texts
Observation Program
And much more...

Managing the Foundation of Customer Service

Preparing for 5-Star Customer Service
Culture
Vision
Mission
Brand Promise
Preparing for 5-Star Customer Service

**Culture**
- Define Attitudes
  - Disney?
  - Ritz Carlton?
  - Nordstrom?
- Define Behaviors
  - What will you do NO MATTER WHAT?

**Vision**
- Where in 5 years?
- Strategic Planning
  - Where are you now?
  - Where are you going?
  - How are you going to get there?

**Mission**
- Why do you come to work every day?
- Every patient every day
- Living the mission

**Brand Promise**
- What every patient can expect
- Manage expectations

Vision

Where in 5 years?

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Goals for a Tier 1 Practice

- Solve any negative issues - FAST!
- Ask for reviews the right way
- Always be positive
- Be so good that you stand out
- Incredible energy
- WOW every patient
- Exceed expectations

Day after day I am realizing that my potential in life is absolutely limitless. I am an unstoppable force for good.

I am going to destroy every obstacle and challenge that come in my path because I know that nothing is bigger than me.

By improving myself every day, day after day after day, I am creating a snowball effect that will propel me through life to incredible success.

Free Tip of the Day

www.LevinGroup.com

The Five Focus Areas - Supplemental Information

For an overview of the Five Focus Areas please visit...
https://levingroup.com/orthodontics-marketing-program

Thank You!

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