



CUSTOMER SERVICE 101

STUDY GUIDE



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STANDARDS OF SERVICE

Being an All-Star Dental practice is more than just going through the motions of learning and getting certification. It means that you **hold customer service and patient care at the pinnacle of everything you do**. Each interaction with your patients, vendors, and especially fellow team members, is sacred and you must commit to uphold service standards consistently.

But why is customer service important? One statistic sums it up: 55% of respondents in a recent survey from Intelligent Dialogue “stopped dealing with an organization” due to “Difficult to do business with,” “Had a problem or complaint that wasn’t resolved satisfactorily,” and “ Found lower prices, but would NOT have left if I had been happy with the service.”

So, in stark terms, **HALF of your patient base could up and leave if they are not satisfied** with the service they are receiving from you and your team members.

Here are five more reasons that service is your most important function in the dental practice:

1. *Great service builds trust.* Any effective relationship between caregiver and patient is absolutely dependent on trust. Providing an experience that “wows” patients is a massive step in building trust.
2. *Service matters MORE than price.* Studies and surveys consistently demonstrate that the right experience is worth spending extra.
3. *Boost awareness in the marketplace.* Rise above your competition by providing an amazing service experience and your patients WILL talk about you to their friends, family, and co-workers.



**QUICK
START**



**PHONE
SUCCESS**



**SCHEDULING
ADVANTAGE**



**CUSTOMER
SERVICE 101**



**PATIENT
EXPERIENCE**



**CASE
ACCEPTANCE**



**INSURANCE
FUNDAMENTALS**



**ALL-STAR
DENTAL MBA**



4. *Great service helps resolve patient issues quickly and cheaply.* Problems with patients are a part of conducting business, but resolving them is much much faster and cheaper if you have a strong relationship (built by providing great service). Patients will trust that if they have a problem, they will get it handled.
5. *Satisfying the “new” patient.* Once upon a time, patients came in the door, accepted what the doctor dictated, and returned for their next appointment., But as patient expectations change and competition explodes, what the patient demands today is very different. They want to have great experiences, seamless performance, and personalized attention - all are taken care of when providing amazing service.

We hope that you enjoy the basics of Customer Service as we present them in this course.



PHONE CUSTOMER SERVICE

- Always answer the phone with a smile
- Speak slowly and clearly during your salutation so the person can hear you
- Take time to listen your own calls to see how you “sound”. It can be awkward at first but some people don’t even realize how they can sound snotty or tired or rude accidentally
- Be prepared to commit fully to the person on the call... Don’t say “that’s not my job or not my department” instead say “the best person to help you with that will be..”
- Try to avoid using an automated phone system with prompts as people find them to be frustrating and impersonal – too many buttons
- If you place a person on hold, be sure to have something pleasant for them to listen to. It’s very awkward to have dead silence on the line while waiting and it’s also annoying to have fuzzy or loud music blaring. A good option is to have nice on hold music that is representative of your practice. If you have a very calming office, have some nice classical on hold music. If you have a more fun office, some nice upbeat (but not too loud or obnoxious) customized acoustic music or something like that is great. You can also have a customized on hold soundtrack be made for your office with some helpful information about your office too. Discuss your doctors accolades, talk about your sizzle points, and mention your office amenities
- Never place a patient on hold without getting their permission
- Always let the patient know if you are going to transfer them and let them know who they are being transferred to (and even why) – keep them in the loop
- Never place a patient on hold for longer than one minute
- Always assume the patient is honest and give them the benefit of the doubt
- Be friendly and treat every patient like a VIP guest
- Make polite conversation with the patient
- Be an advocate and cheerleader for your office, dentist(s), and team



- Do your best to help solve the problem of each and every patient
- Avoid negative language such as I can't, no problem, it's not my job
- Always use positive language such as I will, I am happy to, my pleasure
- Answer each call on the 2-3 ring... avoid letting it go to voicemail
- If it accidentally goes to voicemail, call them back right away
- If there are existing voicemail messages from the previous day, call them back within the first few hours of the morning
- If you are supposed to call a patient back, do so within the same business day or less
- If a patient emails a question, try to call and speak with them personally first. If you can't speak with them or they prefer email, follow my email etiquette guidelines
- Always address patients by the name they prefer (this may be their first name or last name). The best way to find this out is to ask them the name they prefer to go by... or you can say do you prefer we call you Mr. Smith or John? They will tell you what they want. Always make a note of this so everyone is aware.
- Always follow-through on calls with patients even if you don't have an answer for them. Let them know you are working on getting an answer for them. They feel appreciate being kept in the loop.
- If you have a patient calling and a patient in front of you, let the person in front of you know you will need to get the phone and you appreciate their patience. Answer the phone kindly and greet the patient. Let them know you have a patient in front of you being checked out however their call is very important. So you can give them your undivided attention, what is the best phone number and time to call them back...
- Do not be rude to sales people or assume someone is a salesperson without getting sufficient info! You never know who a potential client is or who knows who. People talk and will share a bad experience more than a good experience.
- People are not buying dentistry... they are buying an experience... you can make or break the impression of your office, your dentist, etc by your enthusiasm or lack thereof for your office.



GENERAL CUSTOMER SERVICE:

- Every patient that comes into the office should be warmly greeted with a smile. If you can come out from behind the desk to say hello its ideal but if you cannot then at least stand to greet them.
- Offer them amenities to help make their visit more comfortable (even if it's just a bottle of water). Some offices have snacks, coffee, and tea selections for patients. Some offices even have hand massage and aromatherapy treatments etc
- Don't keep patients waiting... run on schedule and if you do run behind, keep them informed of the delay and be apologetic to them. They will appreciate you letting them know you are thinking of them.
- Avoid having conversations with patients in front of everyone. Keep the conversations with patients private. To avoid having backups at the front desk, make sure there is communication about when patients will be dismissed.
- A big pet peeve – do not have conversations with each other while leaving the patient out. It's extremely rude to have side conversations with your fellow team members while interacting with patients. If you are having a conversation with a fellow team member about something, be sure it's something that is appropriate to discuss with the patient listening (no personal inappropriate stuff) unless you are prepared to involve them in the conversation. For example: If you are talking about a upcoming holiday break or vacation with a team member and the patient comes up, ask that patient if they have any nice plans to do something fun over the holiday break. That way they don't feel left out or awkward.
- Make the waiting room neat, relaxing, and inviting. I do not recommend having the news on TV in any place of the office as most news is negative and makes people nervous. You don't want an even more anxious person in the dental office. Make sure the overall office is always clean
- Do not eat in front of patients... It's rude and smells can offend people. Drinking water is ok but avoid having coffee in front of patients as it leaves the breath smelling like coffee



- If you do choose to have the TV on (which I don't recommend) then have it be something beautiful such as naturescapes or office information (like before and after photos if you do cosmetics/restorative dentistry) or nice testimonials from patients on slides, or even TV that is relatively benign like HGTV or the Food Network. Typically those types of programs don't stress people out. If you do have TV on you also understand you run the risk of them showing commercials for competitor dentists which you also don't want to have shown.
- Smells in the office – this is up to the offices discretion. Some offices choose to have candles (flameless candles recommended) or scented plug in's or some sort of diffuser or aromatherapy. Please understand that even with the best intentions of putting a nice relaxing smell, people's tastes in what smells good varies and some may be turned off by any smell. I agree you want to cover up the typical dental office "smell" that can scare people, but having very strong smells of other things can give people allergies, headaches, and just be a turnoff. Operate carefully regarding what smells you choose for the office and make sure they are very subtle.
- Don't ever complain in front of patients... it's none of their business what is going on wrong. To them, everything is always fine and we discuss issues in private both personal and business
- A big customer service and patient experience no-no is correcting team members in front of patients. This goes for both doctors correcting team members and other team members correcting each other. I have been in several offices where I have seen this done and it makes patients feel very uncomfortable. Use example of Chiro office and Pulmology office. The doctor or person who is doing the correcting might think they look and feel important but it's very off-putting and makes the team overall look disorganized. There is an old saying that you criticize or correct someone in private and you praise in public. This helps build someone up and not tear them down.
- Smile and make eye contact with your patients as much as possible
- Decide how you will greet your patient when you first meet them and when you are welcoming them back. I preferred to shake hands with my patients unless I had an



excellent rapport with them in which I would feel comfortable to hug or kiss them on the cheek. We are in south Florida where cheek kissing is much more culturally accepted than possibly elsewhere. Decide what works best for you but be warm and friendly. If you know a patient doesn't like to be touched, make note of this and don't do it. I would always get an occasional germaphobe who didn't want to shake hands or touch. A simple wave or smile is good for them. If you do plan to touch someone, obviously make sure your hands are clean. Also, if you do plan to shake hands, do not do the dead fish limp handshake. Present a strong firm (but not squeezing their hand) handshake. Many dentists and more introverted team members are more likely to have a weak handshake... nothing says lack of confidence more than this. Practice your handshake and how you greet patients when you see them!

- Try to review your patient charts before they come in to the office and always review personal details on them so you can be sure to connect, build rapport, and make pleasant conversation
- Avoid having a sour face (RBF) – pay attention to how you look and your facial expressions
- Make every patient feel special and try to anticipate their needs – exceed their expectations...notice if they have an upcoming birthday and wish them a happy birthday...comment nicely on their hair if they changed it or their outfit if you like it or anything nice you can say to them. Talk about coming around counter with bag at Bloomies or how they mailed me a desktop calendar from Ruby's when I didn't know the day. We can model more than the best in dentistry...we can model the best fortune 500 companies in what they are doing to make an amazing pt experience... When we go to lecture places and ask teams and dentists who does your office want to model, most don't say xyz dental office...typical answers are Nordstrom, Ritz, Chic-fil-a, Zappos, etc
- Do not leave patients sitting alone for long in the dental chair...have someone (an assistant, manager, admin team, someone) come in and make conversation
- When speaking to a patient, be at their eye level...avoid talking down to patients when in the chair as this can be intimidating, especially when you are the doctor.



Sit in a chair at their eye level to talk with them, or stand up and talk to them if you are behind a desk...if possible, come out from behind the desk so there is no barrier

- Try to avoid having a wall or barrier between the patients in the waiting room and the reception room as this can seem cold and uninviting. Do not have a window closed off to patients in the waiting room...this is very old school and looks totally unwelcoming...we want to make this an experience to remember. Even mention how some have signs that ask not to knock on the window and to sit down until you are called (so rude and unprofessional)
- Everyone that passes a patient in the office should say hello and smile
- Dress professionally and look well done out of respect to yourself, your patients and team. Dress to IMPRESS!
- This should go without saying but do not have a patient bring up their own chart to the front (if you still have paper charts)... this is so classless and I am shocked to see how many offices still hand the chart to the patient and have them bring it to the front
- Always hold the door open for the patient and walk in front of them guiding them to where they need to go... don't run ahead too far or talk to the patient without looking at them. Don't let the patient go ahead of you since they don't know where they are going if they are new.
- Keep the temperature more on the cooler side but always have a blanket or something for a patient if they are cold.
- Hygienists – don't turn on the TV for the patient, especially not right away...allow time to connect and build rapport with the patient...they are coming to see you not the TV. During their cleaning you can ask if they would like the TV but I still hesitate since this is a good time for them to review their findings during your cleaning with you
- Always be sure to ask the patient if they are comfortable and if you can get them anything. Ask for their feedback on how you can always improve the office



- Avoid “back talking” to a patient – what this means is don’t talk to the patient with your back turned toward them. It’s rude and off-putting. If you need to take computer notes let them know that’s what you are doing but try to keep looking at them when you ask questions and then turn to enter the notes in the computer. Also, let a patient know if you need to leave the room and that you will be back briefly... if they can’t see you they won’t know you left
- Have a nice relaxing office music playing at all times like a spa station for Pandora or something so you don’t have background dental offices noises or hear conversations of team members. Try to avoid playing the radio because of the commercials. Do not have loud or distracting music playing
- Make sure everyone on the team is aware of all marketing and email offers that are going on in the practice and what services you offer. It makes a practice look very disorganized to have people that don’t know what’s going on as far as specials, social media offers, etc...Discuss these things at your team meetings or have a bulletin board where you list what is going on...make sure everyone signs off they read it
- What is customer service and why is it important to serve our patients? Discuss how serving benefits them and us too...use trees with roots and branches story...how the roots matter most in helping others. Changing people’s lives improves our lives.



HOW TO HANDLE A NEGATIVE REVIEW ONLINE

You can tweak this for your office but here is the concept:

1. Thank, acknowledge, and sympathize kindly without being defensive
2. Insert some marketing in case others read the review
3. Keep replies short and sweet
4. Move the conversation offline

Example:

"Thank you, {Patient Name or Alias} for your review and feedback. We understand that your experience did not meet your expectations and we apologize you feel this way. We always strive to provide the highest level of customer service and satisfaction to our patients. We welcome you to contact our office to speak with us or send us an email to email@contactus.com so we can look into this further!"

I would also note how it's important to actively always seek to get the good clients to post positive reviews... if someone compliments the office or says they loved their visit, I would automatically ask this person to post a nice review or email them a link to post