

CASE ACCEPTANCE *for* EVERYDAY DENTISTRY



*A Non-sales Approach to
a Healthier Practice*

*With Dr. Paul Homoly, CSP
Facilitator Guide*





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Gather your staff together every two weeks for about an hour to complete the training. It's important to meet frequently to study and practice the principles in the program. This keeps it top of mind and sustains the momentum toward growth and success in your office.

Facilitator Guide

The Facilitator Guide provides the information and direction needed to lead the **YES! On-Line** program.

- Each page of the Participant Workbook is pictured, with a corresponding page number for quick reference.
- Facilitator notes and suggested comments are provided in the left margin of the page.
- Step-by-step instructions are provided for activities and group discussions.

Icon	The icon indicates when you should...
	Play the on-line video module.
	Facilitate a team activity.
	Have participants complete mini quiz.
	Facilitate a team debrief.

Building the Habits:

We highly recommend you meet for an hour every two weeks to complete the training program. It's important to meet frequently to study and practice the principles in the program. This keeps it top of mind and sustains the momentum toward growth and success in your office.

Required Equipment:

- High-speed Internet access
- Computer with sound system
- DVD player and monitor

Scheduling:

- Gather your team together for about 60 minutes every two weeks to take part in the training.
- Allow adequate time for each learning module. The run time for the video is provided on Page 4.
- Choose an appropriate time of day to view the modules. Avoid lunch hours or after work.

Programming

Video Time Required	Module Name
18:10	OVERVIEW MODULE: <i>An Introduction to YES! On-Line</i>
18:00	MODULE ONE: <i>Anatomy of the Discovery Guide™</i>
16:40	MODULE TWO: <i>The Influencing Discussion Sequence</i>
14:48	MODULE THREE: <i>New Patient Interview Telephone Strategies</i>
13:26	MODULE FOUR: <i>In-Office New Patient Interview</i>
15:31	MODULE FIVE: <i>Discovery Guide Dialogues</i>
15:40	MODULE SIX: <i>Case Presentation</i>
16:22	MODULE SEVEN: <i>The Fee Conversation</i>
11:30	PATTY'S ROLE PLAYS

*The Overview Module is a pre-requisite to training and should be viewed by the team prior to the other modules. The Overview Module gives you a quick start into the content of the case acceptance curriculum and gives you the big picture of the **YES! On-Line** process.*

Welcome participants to **YES! On-Line**.

Introduce the **YES! On-Line** program and its benefits to the team.

Recommend that every dentist in the practice reads Dr. Paul Homoly's book "**Making It Easy for Patients to Say YES.**"

YES! On-Line is your source for influencing patients to make good health care decisions, and, at the same time, increase case acceptance in your practice.

YES! On-Line will help you:

- Get your entire team on the same page when influencing patients to say "YES"
- Make it immediately obvious to patients that they're in the right place for their dental care
- Stop losing patients by offering more dental care than they're ready for
- Increase your average treatment fee and practice profitability
- Eliminate case acceptance stress
- Connect and form relationships with patients
- Increase confidence and leadership skills
- Enhance your sense of professional accomplishment
- Experience greater fulfillment
- Surround yourself with a team that excels in the case acceptance process



*The concepts in the **YES! On-Line** series have improved the dentist and team experience for more than two decades. The foundational concepts of the program are taken from the work of Dr. Paul Homoly in his book "**Making It Easy for Patients to Say YES.**"*

For a copy of this book and informational audio CDs go to www.paulhomoly.com. Dr. Homoly highly recommends you read and study this book.

Distribute the **YES! On-Line** workbooks to participants.

Describe the program format and schedule.

Be sure to consider salary expectations whenever you ask team members to give their personal time to the development of the practice.

Program Introduction

YES! On-Line is a self-paced program for dentists and their teams. The modules in this series are designed specifically for those patients whose total case fee is less than \$5,000. The programs are short and content is bite-sized to maximize learning. **YES! On-Line** is designed so you can stop the video programming anytime for discussion or note taking. You should complete each module and all associated activities before moving on to the next module in the series.

When conducting in-office training, we recommend that your team views the video modules using the **YES!** DVDs. Team members are encouraged to watch the videos on-line individually to review and reinforce key principles learned in team training sessions.

YES! Connections

YES! Connections is an on-line community discussion forum hosted on our webpage. We've created a community of like-minded dentists who share their experiences, mentor each other and grow as a community in their professional and personal lives. This is the best place to make comments and ask questions related to **YES! On-Line**.

YES!
Connections

YES! Connections allows you to collaborate with Dr. Paul Homoly and other colleagues, and to suggest improvements to YES! Online. Add your comments at any time.

ADD A COMMENT / ASK A QUESTION



Play Overview Module.

Begin the team training by showing the Overview Module video. This is an introductory video and gives you a quick start into the content of the case acceptance curriculum. It gives you the big picture of the **YES! On-Line** process and is a prerequisite to the other modules in the series.

Feel free to stop the video and discuss aspects of the Overview Module at any time. Keep in mind that this is an overview of the program.

After viewing the Overview Module video, lead a conversation with the group about why it's important for the team to excel at the case acceptance process.



Play Module One.

Instruct participants to follow along in their workbooks and take notes.

MODULE ONE: Anatomy of the Discovery Guide™

MODULE ONE: Anatomy of the Discovery Guide™

Let's start with the good news and bad news. The good news is that we're really good at identifying unhealthy conditions in our patients' mouths. The bad news is we're much too eager to talk about them.

Confronting patients with a list of all the things wrong with their mouths, followed by a detailed description of how to fix them, is a great way to confuse patients, overwhelm them with too much information and inspire them to leave the practice. Instead, learn the language of disabilities and conditions, help patients make good decisions about their dentistry, and keep them in your practice.

The secret is learning the language of disabilities and conditions.

Conditions and Disabilities

To begin our understanding of how to best communicate with patients requires us to know two simple definitions – condition and disability.

Condition - the clinical finding that's outside of normal limits. It's not normal or healthy. Conditions in dentistry include things like fractured cusps, abscesses and gum disease.

Disability - the patient's experience with the condition. Usually the disability is emotional in nature. The disability is how the condition is bothering the patient.

EXAMPLE: *A patient who has discolored front teeth may be embarrassed about her appearance. The condition is the discolored teeth and the associated disability is the patient is embarrassed about her appearance.*

Distinctions – Patients with or without Disabilities

1. Patients who have conditions with disabilities usually have significant, unwanted effects in their lives.
2. Patients who have conditions without disabilities may or may not be aware of their conditions and the conditions have no affect on their lives.

It's this second situation - patients with conditions without disabilities - that is quite common. It also presents the most difficult and frustrating communication challenge for dentists and team members trying to motivate patients to accept treatment recommendations.

MODULE ONE: *Anatomy of the Discovery Guide™*

Communicating to patients with disabilities requires a different approach than communicating to patients without disabilities. To challenge us further, patients often have several conditions – some that are associated with disabilities and some that are not. To communicate in a way that is clear, confident and appealing, we must adapt our style based on the patient’s level of disability and awareness of their condition. A tool called the Discovery Guide™ helps do that.

The Discovery Guide™ is a communication tool that:

- documents the patient’s conditions and his/her associated disabilities
- helps the patient become aware of his/her conditions in a way that makes it easy to listen and understand
- helps the dentist and team become aware of the patient’s disabilities and the patient’s readiness to treat them
- guides our discussions with patients in a way that makes it easy for them to listen, understand and respond favorably to our treatment recommendations

	2		4
YES			
Awareness of Condition			
NO	1		3
	NO	Disability	YES

MODULE ONE: Anatomy of the Discovery Guide™

The Discovery Guide™ is a two-axis chart that relates the presence of disabilities and the awareness of conditions.

- The vertical axis represents awareness of condition. Is the patient aware or unaware of his or her condition?
- The horizontal axis represents the presence of disability. Is the patient experiencing any disability?

	2	4
YES	Aware of Condition No Disability	Aware of Condition Disability
NO	Not aware of Condition No Disability	Not aware of Condition Disability
	1	3
	NO	YES
	Disability	



Ask everyone to take out a blank sheet of paper and draw the Discovery Guide™ from memory.

MODULE ONE: Anatomy of the Discovery Guide™

The Discovery Guide™ Quadrants

The Discovery Guide™ is divided into four distinct quadrants which categorize conditions and disabilities.

	2	Apathetic	Compelled	4
YES				
Awareness of Condition				
NO	1	Clueless	Aggravated	3
	NO		YES	
	Disability			

Quadrant One – Clueless

Patients aren't experiencing any disability and are not aware of any condition – they are clueless to the situation. For example, patients with early onset periodontal disease, asymptomatic periapical abscesses, or dysfunctional occlusions may be completely symptomless – no disability – and completely unaware – clueless – that anything is “wrong” in their mouths.

(Note: The quadrant labels describe the situation in the patients' mouths, not the patients themselves. A patient may be clueless to a dental situation, yet be an intelligent person.)

Quadrant Two – Apathetic

Patients are aware they have a dental “problem”. They know something is not right, but it doesn't significantly affect their lives – no disability. They are apathetic to the situation and unmotivated to do anything about it now. Posterior missing teeth, bleeding gums, jaw joint noises can be typical examples of Quadrant Two situations.

Quadrant Three – Aggravating

Patients are experiencing symptoms that are affecting their lives – a disability – but they're unaware of what's causing it. Typical examples of this include loss of sleep from a toothache of unknown origin, embarrassment from chronic bad breath, or the inability to concentrate brought on by jaw joint pain and headaches. Situations in Quadrant Three aggravate patients, but they don't know what's causing it, and usually want something done about it.

Remind your team why they are learning to use the Discovery Guide™ tool. It relates to important distinctions in the case acceptance process that they'll learn more about in later **YES! On-Line** modules. This important point was introduced in the Overview Module.

MODULE ONE: Anatomy of the Discovery Guide™

Quadrant Four – Compelling

Patients have a distinct disability and are aware of what's causing it. Good examples of this are the embarrassment associated with discolored/chipped front teeth, inability to enjoy food caused by a loose mandibular denture, or slurred speech associated with a sore tongue rubbed raw by a broken filling. Situations in Quadrant Four mean patients are very clear about why they are in the dental office. These situations are compelling and patients usually are very interested in treating the condition responsible for the disability.

Charting vs. Mapping

Two distinctions must be made to understand how to use the Discovery Guide™ during the examination process – charting vs. mapping.

CHARTING is the clinical information recorded on the patient record. The clinical chart is used to document the patient's diagnosis and personal information.

MAPPING is the process of documenting the patient's conditions, by awareness and disability, on the Discovery Guide™.

Michelle's Discovery Guide™

		2		4
Awareness of Condition	YES	#3, #14		#6-#11
	NO	Perio		#28, #29
		1		3
		NO	Disability	YES



Briefly review the main points of the module. Guide participants through each page of the module in the workbook and complete any discussions or activities noted in the Facilitator Notes. Encourage questions and comments.

Explain/facilitate the activity.

Instructions:

1. Make 10 copies of the Discovery Guide™.
2. Select five recent new patient records.
3. Map the new patients' conditions, by their awareness and disability, on the Discovery Guide™.
4. Select five existing patients from recare and map their conditions on the Discovery Guide™.

Debrief:

***You probably found you do not know your patients disabilities. What does this tell you about where your focus resides with your patients?*

MODULE ONE: Anatomy of the Discovery Guide™

Module One Team Activity

1. Make copies of the Discovery Guide™.

	2	Apathetic	Compelled	4
YES	Awareness of Condition			
NO				
	1	Clueless	Aggravated	3
	NO		YES	
	Disability			

2. Select five recent new patient records.

3. Map the new patients' conditions, by their awareness and disability, on the Discovery Guide™.
4. Select five existing patients from recare and map their conditions on the Discovery Guide™.

You'll probably find you do not know your patients disabilities. What does this tell you about where your focus resides with your patients?



Give participants 5-7 minutes to complete the Mini Quiz.

Encourage your team to think of actual patients who would fit into the Discovery Guide™ quadrants.

NOTE: Participants should work individually to answer the quiz questions.



Facilitate a team debrief around the activity and answers to the quiz.



MODULE ONE: Anatomy of the Discovery Guide™

Mini Quiz

Answer the following questions and be prepared to share your answers during a team debrief.

1. What is the difference between a condition and disability?

2. Give a clinical example of a condition in Quadrant One.

3. Give a clinical example of a condition in Quadrant Two.

4. Give a clinical example of a condition in Quadrant Three.

5. Give a clinical example of a condition in Quadrant Four.

6. How does the Discovery Guide™ help you understand your patients better?

Team Debrief

Review and discuss your answers as a team. Allow time to view **YES! On-Line** Module One again as needed. Do not move to Module Two before completing all parts of Module One.

You should meet every two weeks to complete the training. It's important to meet frequently to study and practice the principles in the program. This keeps it top of mind and sustains the momentum toward growth and success in your office.

YES! Connections

Get involved in **YES! Connections** by posting your questions and comments about this module. **YES! Connections** is a great place to get guidance and clarification on the important work you are doing.