

In the zone

Zoning your appointment book is key to five-star service, says **Laura Horton**

If you want to have fun at work and provide five-star service then you need to sort out the bare bones of your practice – the appointment book.

The question, ‘When would you like to come in?’ should be banned in your practice if you wish to be productive as a clinician, focus on the longer, more complex treatments at the right time of day, and have a team that can deliver great customer service.

I work with practices to increase their overall patient experience, from working with the front desk team and implementing the role of treatment coordinator to helping dentists deliver the ‘wow’ factor, examinations and treatment presentations. But there is often one stepping stone that becomes a boulder too big to cross or ignore and that’s the clinician’s diary.

When patients have control (which they do when you ask, ‘When would you like to come in?’) your appointment book is not going to be productive, and the service you wish to provide to your patients will be harder to achieve.

I have been ‘zoning’ appointment books since I was a 21-year-old nurse. I was working with a vocational trainee for the first time, and as he had the only NHS book in an eight-surgery practice, he was fully booked with examinations. It meant that we couldn’t get any patients in for their treatment, but this was solved by zoning the book.

After working in practice for 13 years, **Laura Horton** worked with dentists and their teams from 2005 and since 2008 through her own company, Laura Horton Consulting LTD. Laura is a treatment coordinator business consultant, and successfully helps dental practices throughout the UK to develop into customer-focused businesses which outperform their competition. Visit her website www.laurahortonconsulting.co.uk or contact her directly on 07912 360779.

The front desk team

Let’s talk about the front desk team. They know they have a job to do, and they know that the phone is an extremely important aspect of the practice’s success, but how can they deliver when there is nothing but utter madness occurring in their work environment?

Picture an 8.30am start. The phones ring, because they are always busier in the morning than the afternoon. If you are a big practice or, more importantly, a mixed practice, then the morning slot is horrendous – the phones do not stop ringing!

On top of this you have patients coming in and out for examinations, patients queuing at the desk – and you expect your front desk team to deliver outstanding customer service from all angles? You are asking for the impossible!

Let’s move onto the clinicians. It is well known that many people perform better in the morning than the afternoon. I have never been a fan of having an actual lunch break. One hour to sit and relax, no thanks – I will be lethargic as anything in the afternoon! Yet so many practices still have an hour for lunch because the team wants this. What is this doing to the clinicians? I guess you’re tired in the afternoon and would probably prefer half an hour to eat and then get back to it?

You then find the long treatments are booked in after lunch because guess what – the first and last slots of the day are taken by patients who book six months ahead for oral health assessments!

Who fancies doing preps and RCTs after lunch? I am yet to meet one dentist who would not rather have them booked in the morning session. I am not a dentist but it must be hard, looking through loupes at the same area for an hour or more – that must tire your eyes.

Production levels

I push my practices to look at their finances on a monthly basis, but the dentist must know their daily target. If the ▶

Day of the week	£ target	Working hours	Yellow time	Green time	Red time
Monday	£2000	9am – 5pm	9am – 1pm	2pm – 2.40pm	2.40pm – 5pm
Thursday	£2800	9am – 5pm	10am – 1pm	4pm – 6pm	2pm – 4pm and 6pm - 7.30pm
Saturday	£1600	9am – 12pm	9am – 10.30am	11.15am – 12pm	10.30am – 11.15am

Table 1: Example of an appointment book

Colour code	Examples of treatments	Appointment value (invoiced fee)
Yellow	Preps and RCT, quadrants of fillings	£500 or more
Red	Fillings, whitening, single tooth RCT, examinations	£499 or less
Green	Reviews, crown and bridge fittings, treatment presentations	£0

Colour code	Examples of treatments	Appointment length
Yellow	Preps and RCT, quadrants of fillings	One hour or more
Red	Fillings, whitening, single tooth RCT, examinations	30-59 minutes
Green	Reviews, crown and bridge fittings, treatment presentations	1-29 minutes

Tables 2 and 3: Two ways to zone your appointment book – either by appointment value or length

daily invoice target were £1500, how would you feel if you had achieved 75-80% of this by lunchtime?

This is the ideal:

1. Outstanding customer service for your patients
2. Diaries that allow production targets to be achieved and for the clinicians to do the hardest work while they are freshest.

The simple answer to this is to zone your appointment book. It is a simple process – you just have to decide on the zoning structure, keep it simple and confirm the date it will start from.

This is how you start to zone your appointment book:

1. Work out the dentist's daily invoice target and share this with the team
2. From this target look at your fees and pick between the cost aspect or the time aspect. So, for example, the higher fee appointments of over £500 go in the morning only, while check-ups will be in the afternoon; equally, the jobs that take over an hour will be in the morning and the shorter appointments in the afternoon
3. Work out how many new patient (NP) examinations each dentist needs per week. Remember to look at the conversion rate and average NP spend when working this out to get the right numbers
4. Work out how many children you have to see each year and block these appointments into children's days (or afternoons) and only see children on these days (preferably in the school holidays)
5. Colour code the appointment book into sections
6. Confirm the start date
7. For patients that want morning examinations, look at introducing combined appointments in the hygienist diary.

There may be other factors that your practice needs to

look at, too. The biggest objections you will have from the team are:

1. 'What do we say to patients?'
2. 'What if a patient says, "No, I can only come in on Thursday mornings"?''

In answer to this: write scripts and practise together. For every possible objection, write down a response that confirms what the benefits are for the patients. For example, for the above questions, you might say that there is now a better service with more time dedicated to them, or that the dentists are requesting that the longer appointments are booked in the morning to tie in with the labs.

There are two top tips that I can give you, which are:

1. Be in control of the situation and the appointment book. It's not what you say, it's how you say it. Give the patient a choice of two appointments: if they don't take one, repeat again until they take one of the two offered
2. When the patient has a treatment plan, the dentist must confirm with the patient that they need them to come in for a morning or afternoon appointment – we all know patients do as the dentist asks!

New patients

New patients often turn up when you are busy, resulting in the first impression of the practice being a poor one: queues at the desk, busy phones, and dentists running late.

You need to put blocks in your appointment book for new patient appointments. Spread them throughout the week. Look at how many you need per week (in line with your conversion rates) and look at the most popular times – then plan accordingly.

Tables 1, 2 and 3 are example appointment books for a practice. All the sessions are colour coded so the team knows where to book the patients.

You can see from Table 1 that the dentist always has the long appointments in the morning but the red and green zones are mixed around.

For this practice, new patient examinations and recall examinations fall into the red time. The most popular place for these appointments, in particular the new patient exams, is the late evening session on the Thursday so they have blocks there not only for recalls but for new patients too.

Using your software to your advantage

I still see dental practices under-utilising their dental software. One example of this would be the treatment plans and estimates.

All of your codes need to be organised correctly and estimates created for every treatment the patient is having. With one software company, when you are looking at the appointments due to be scheduled you can see the value of that appointment without having to go into the treatment plan. This makes it much easier for the front desk team (I used to find this very useful if a patient didn't book their appointments on the day and I was calling them to book them in over the phone).

If the clinician is creating the treatment plans correctly then they too know the value and can confirm with the patient that the appointment needs to be booked in a morning or afternoon slot.

The final tip I can give you when taking control of your appointment book is to complete a handover for every

patient. Patients should not be left alone when leaving the treatment room and arriving at the front desk.

Ideally, the dentist should finalise all of the details that have been discussed, saying for example, 'To confirm, we have completed your routine oral health assessment today and you need one appointment with our hygienist and you have decided to have the crown on the broken lower right tooth. The appointment with the hygienist will be on a Monday, Wednesday or Friday afternoon, the appointments with me for the crown will require a one hour and 15 minute appointment on a Tuesday to Friday morning. The appointment to fit the crown needs to be two weeks later but this time in an afternoon: how does that sound?'

If the dentist or the nurse takes the patient to the front desk and repeats all of this to them with the patient by their side, the patient does not have an opportunity to say, 'Dr Smith said he wants all the appointments to take place on Wednesday mornings.'

The next trick is for the person at the front desk to repeat the same information again and then begin the process of finding out which afternoon is best for the hygienist and offer the patient two appointments; this process then repeats itself for the remaining appointments required.

This may seem like hard work but the result is that you have more good days at work, more opportunity to have fun and ultimately you will build better relationships with your patients because you will have the time to treat them all in the best way. **PD**