

A SPECIALIST

for Specialists

by Chelsea Patten
staff writer, *Orthotown Magazine*

"It takes a lot of skill to change things that have been done the same way for years," says Jay Geier, founder and president of the Atlanta, Georgia-based Scheduling Institute (SI). With more than 25 years of experience, Geier and his team of trainers work with doctors and staff on the fine points of taking a practice to the next level. The first goal for each of these practices is to get more new patients in the door. The solution starts with the most basic necessity: answering the telephone.

Geier says, "Ninety-eight percent of new patients call before coming into your office. This means your front-desk staff is their first impression and the 'gatekeeper' to your schedule." Research conducted by SI suggests most orthodontists lose 10 to 50 percent of potential new patients due to staff's poor conversation skills and a lack of understanding of the value a new patient brings to the practice. This means if an orthodontist averages 30 new patients per month, valued at roughly \$2,500 each, he or she could be losing between three and 15 of those, or \$7,500-37,500 per month. Geier says, "If your staff is not trained properly on how to handle these calls and 'close' new patients on your practice, they could be costing you more than just their compensation. On the other hand, if they were, they could help you increase new patients and be revenue producers in your practice."

To prevent losing valuable new patients, SI helps practices establish the Baseline (approximately 10-15 percent above the average number of new patients per month an orthodontist currently has) and the Goal (usually 25-40 percent more than the Baseline). By using incentives to motivate, the staff is trained with Geier's proven concepts and strategies for effectively handling new patient calls. SI holds each staff member accountable to these standards with Mystery Calls – when a person from SI calls the prac-

tice posing as a new patient – that are evaluated and “rated” on their 0-5 scale. “Mystery Calls are like a test in school,” says Geier. “It’s what determines if the individual staff member is applying the strategies they learned and it’s a gauge of how many new patients you may be losing.” Geier goes on to explain that if the person who answers your phone receives below a 4 rating, that person is losing new patients. “But if you never test your staff you won’t actually know what you’re losing. New patients will call, but never come in. You’ll spend to get them to call, but you turn over complete control of what happens once they call to your staff,” says Geier.

There are many facets to SI’s program – telephone training, incentivizing, systematizing, creating constant accountability and receiving coaching and consulting from someone outside of your practice. And although the program seems to have popularity in the general dentist circuit, it is just as effective for orthodontists. Dr. Jacqueline Moroco, one of the three case studies later in the article, says the principles Geier teaches are “applic-

able across the board. We’re all running businesses that need more patients.”

SI has the statistics to prove what they teach works, but they don’t want you to just take their word for it. *Orthotown Magazine* asked three orthodontists with three very different practices about challenges, changes, hard-to-learn lessons and new optimistic views of the future. They all started with the telephone training program and each credit that as being the catalyst for their subsequent success. Now, these orthodontists have progressed to higher membership levels within the organization and have continued to grow their practices with Geier’s targeted advice and accountability. They have not only increased their new patient numbers, but have improved their bottom line and all have happier, motivated and more valuable staff. Dr. Kerry White Brown, an orthodontist who has four locations in South Carolina, started working with Geier in January of this year and says, “I wish I had met Jay Geier when I started my practice. I would be in a totally different place right now. Where I wanted to be in 10 years...I think I would be there now.”

f Case Study #1: Dr. Dustin Burleson Burleson Orthodontics • Kansas City, Missouri

Initial Results:

“Hiring the Scheduling Institute has been the single best decision I’ve ever made for our practice. Our revenue and my take-home pay tripled in less than a year.”

“We were growing really quickly,” says Burleson, “and we were looking for a system to manage that growth.” Right off the bat, Burleson acknowledged a big increase in new patients upon completing the telephone-training course. Within just a few months the practice went from averaging 60 new patients a month to 85-100. Their record new patient month was in March of this year (131 new patients).

The team went through additional training courses with SI that helped in other areas of the practice. Burleson says, “We went from 300 starts per year to more than 630. Our patient referrals have doubled because our patients are receiving better customer service.”

Changes After Implementation:

“It’s one thing to rack up new patients. It’s another thing to deal with them once you have them. Jay has always said, ‘We solve a problem which creates another problem.’ We had all these new patients but really had to overhaul our scheduling system because we wanted to accommodate those new patients,” says Burleson.

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Burleson and his team got involved with Geier's coaching program, an option subsequent to completing the telephone-training program. "He teaches doctors how to manage human capital, space and equipment and marketing," says Burleson. Geier also helped Burleson implement an internal marketing system.

Burleson recently had to double the new patient consultation space and reception area in his office to accommodate the number of new patients. "We want patients to be comfortable, which means offering more hours and a larger space, so patients don't feel like a number." The doctor is planning to move the practice into a larger building soon. They've also hired associates including a pediatric dentist to broaden their services and they expanded their hours to better accommodate their patient's schedules.

Dr. Burleson's staff



"Our staff is more motivated and satisfied in their goals," Burleson says. He attended a coaching workshop at SI's Training Center in Atlanta at which Geier laid out an incentive plan for his clients to implement with their staff. Burleson implemented it the next day and it produced their best day of production ever.

The tone SI sets in offices is designed to change attitudes and perspective about helping patients. A refreshed Burleson confirms, "What employees do in the office is a mission. It's all about serving patients and focusing on them, versus focusing on us." He repeats one of Geier's words of wisdom, "If a patient gives you a dollar bill, you should give him a lot more in return (for years). We're in the business to serve patients, which means we need to give them what they need."

Biggest Lessons:

"I have all the same problems other orthodontists have. The difference is, with the Scheduling Institute's guidance I solve them and get onto the next problem in life." Frustrations lead to breakthroughs; Burleson has adopted Geier's philosophy as his practice mantra. "Each obstacle is presented as an opportunity; a chance to get better as a team. My office manager says a problem means something good is right around the corner."

A New Image of the Future:

Burleson says, "SI is like my golden goose that just keeps laying golden eggs." He says he'll continue to follow their advice.

**2 Case Study #2: Dr. Jacqueline Morocco Maloney
Morocco Orthodontics • Del Rey Beach, Florida**

Initial Results:

"I don't think I was completely aware of my challenges initially," says Dr. Jacqueline Morocco Maloney. At a seminar where Geier was the guest speaker, Morocco heard a recording of a phone conversation between one of her staff members and a potential new patient. She says, "It was blatantly obvious as to the lack of training. Because I'm not up there, it's easy to put my head in the sand. I didn't realize the problem until I heard it." Before Morocco Orthodontics began working with the Scheduling Institute in 2009, they averaged 28 new patients a month. They now average 37.

Changes After Implementation:

"The staff was uncertain and resistant about the training program," says Morocco. "But once they knew I was committed to the process, I started to notice the staff feeling more confident about new patient phone calls and saw more excitement from them." Morocco says setting goals and incentivizing those goals, which are two of the steps in Geier's program,

greatly helped production and office morale.

Morocco had also maximized her production ability in her old office, and needed a more efficient space. "Jay helped me realize there was no way I was going to do what I wanted in my old facility. We moved in October 2010." The practice went from 1,575 to 2,800 square feet. Production for the first half of 2011 is up 22 percent over the same period last year. Based on production in the first six months of this year, Morocco and her team are on pace for a 27 percent increase in production over 2010.

With Geier's advice on improving her case presentation, Morocco has also been able to add an additional \$100 to her average revenue per patient.





Dr. Morocco Maloney and her staff

Biggest Lessons:

“You can’t take your eye off the ball in any aspect of your practice,” Morocco states. If she had to start her practice all over again, she would spend a lot more time at the beginning setting up systems and training her team. Morocco has also learned to get excited about challenges, taking them as opportunities to change and improve.

A New Image of the Future:

Geier has taught her many valuable things and she says, “I have learned to focus on the practice as a business, as an investment. Even though I have no intention of retiring anytime soon, my best investment right now is my practice. If I continue to follow Jay’s advice, when I do want to retire, the practice is there to support me.”

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**Case Study #3: Dr. Michael Weathersby
Aspire Orthodontics • Cleveland & Ooltewah, Tennessee**

Initial Results:

Everyone thinks their office is the exception. Dr. Michael Weathersby says, “Clinicians will describe their ‘unique’ practice and staff and create reasons why Geier’s technique will not work in their office. I had the same misconceptions, but I needed to do something about the decline we had experienced for the past few years.”

Weathersby’s long-time friend and colleague Dr. Bob Gallien, a dentist in a neighboring city, worked with SI for almost three years. Weathersby often asked Gallien for ideas he thought would work in his orthodontic practice. Weathersby says, “I tried to implement a few of the things Jay teaches that I got from Bob, but with little success.” In April 2011 Weathersby joined SI and in June saw 99 new patients up from an average of 51 in 2010.

One of the greatest challenges for Weathersby, and many clinicians, was overcoming the idea that no branch of dentistry is different when you are talking about increasing patients. Weathersby says, “Increasing new patients means increased production. Period.”

Changes After Implementation:

In addition to a steady flow of new patients, Weathersby noticed changes with his staff. “At first there was fear of the unknown, animosity concerning how they used to speak on the phone and then eventually excitement and engagement. The staff noticed what they were doing was working when we had an increase of 39 percent this June (99) as compared to last June (71)!” Their average revenue per patient went up \$200 and based on production January through June of this year, they are on pace for a 21 percent increase in production over 2010.



Dr. Weathersby and his staff

Biggest Lessons:

Weathersby says new patient generation is something clinicians have to work at every day. He adds, “Every day you ignore it, you will see a decline in your practice. Work every day on new patients and your practice will grow!”

The doctor mentions, “Fortunately I was exposed to SI in only my third year of practice, but if I could, I would have started with Jay when I was in my residency.”

A New Image of the Future:

Before implementing SI’s program, Weathersby admits to running his practice day-to-day, mostly without a plan. “Now I have clearly defined goals both for the practice and for myself.” Weathersby mentions the structure and accountability that makes once-unrealistic goals attainable. “Jay and SI have provided us with a roadmap to navigate obstacles,” he says.

If you would like to learn more about Jay Geier and his team at the Scheduling Institute and the services they offer orthodontic practices, visit www.newpatientspecialists.com, e-mail info@schedulinginstitute.com or call 877-588-4990. ■

