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The face of your practice



Is your business assistant a **positive** or negative for your practice?

by Dianne Glasscoe-Watterson

For more on this topic, go to www.dentaleconomics.com and search using the following key words: *patient, business assistant, customer relations, policies and procedures manual, professionalism, Dianne Glasscoe-Watterson.*

Here's the scenario. Your 11 a.m. patient is a new patient. He arrives at 10:45. The business assistant is talking on the phone to a friend and ignores his arrival. The patient notes the appearance of the business assistant, who wears a tight, casual shirt with two inches of

cleavage exposed. She has stringy hair, numerous ear piercings and a nostril stone, and is happily chewing gum. She twists her hair around her finger as she chats.

The patient's perception of the practice is formed within the first 30 seconds of entering the office. It is heavily influenced by the business assistant's appearance and how he is received by her ... or, more accurately, how he is ignored by her. He thinks, "This place is not very professional. He signs the sign-in sheet and takes a seat.

Finally, the assistant ends her telephone call. "Excuse me, what is your name?" she asks.

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Patient: “My name is David Watterson.”

Assistant: “I don’t have you in my schedule.”

Patient stands, approaches her desk, and says, “You must be kidding! I’ve had this appointment for four weeks!”

Assistant: “How do you spell your name?”

Patient: “W-A-T-T-E-R-S-O-N.”

Assistant: “David, right? Oh, here it is! OK, I need you to fill out some forms.”

The patient wonders if the assistant even looked at the sign-in sheet. As he sits down to fill out the registration and medical history forms, the clinical assistant calls his name. He hasn’t even begun to fill out the forms. The clinical assistant seems agitated at the delay. She has no way of knowing that he arrived early for his appointment. He feels like telling her that the business assistant caused the delay but decides to let it go. He hurriedly fills out the forms and hands them to the business assistant.

Fast forward to the patient dismissal. Mr. Watterson is standing in front of the business assistant to check out. He needs to schedule an appointment to return for a restorative procedure.

Assistant: “Do you have dental insurance?”

Patient: “Yes, through IBM.”

Assistant, staring at the computer: “IBM? I don’t see that in my list. What does that stand for?”

At this point, the patient is getting the feeling that this assistant is completely incompetent. He says slowly, “IBM stands for International Business Machines.”

Assistant: “Well, I still can’t find it. I guess you need to pay the full amount.”

The patient looks through his billfold and produces an insurance card. The assistant examines the card and says, “OK, I’ll make a copy of your card. Maybe this will help me find your company in my list.”

The patient is very frustrated with the business assistant’s obvious incompetence. As he produces a credit card to pay a bill that he is certain will be covered by his insurance, he remarks that he expects a refund when the insurance company pays. It occurs to him that this assistant may not know how to file his insurance.

As the patient waits to schedule a return visit, the assistant asks, “And what is your name again?” For a brief moment, the patient can’t believe she asked this question. Without a word, he turned and exits the practice, vowing never to return.

Business assistants — the “face” of the practice

This true story is an example of customer service at its worst. The frustrated patient left the practice because of a business assistant who was inadequately trained to do her job. She lacked professionalism and business acumen, but even more importantly, she lacked people skills. Possibly no one taught her about the importance of a professional appearance, or maybe there were no standards of appearance in

the office where she worked. Maybe she had no good role models from which to learn her job. Maybe she was one of the thousands of business assistants who are “baptized by fire” into positions where they are expected to learn from people who are inadequately trained themselves!

Doctors, please understand that your business assistants are the face of your practice. Patients will often judge the quality of the dentistry in your practice based on two primary factors: 1) the business assistant’s appearance and 2) the level of attentiveness and congeniality conveyed by the assistant to the patient.

Policies and Procedures Manual

Do you have written standards of appearance in your Policies and Procedures Manual for your business assistants? If you do not set the standards, assistants feel they can dress any way they choose. These staff members are the business liaisons for the practice, and as such, they should look like business professionals. A casual look is fine for outside the office. But in the dental office, a casual look does not promote professionalism and will result in lower levels of respect from patients.

Items to be addressed in your written standards should include:

- *Attire*
- *Hair*
- *Jewelry*
- *Fingernails*
- *Body art/piercings*
- *Modesty*

Here is an excerpt from one of my client’s manuals:

Proper attire

Along with appropriate personal conduct, a professional appearance is required of all employees. We expect all staff members to present themselves with a well-groomed appearance in appropriate uniforms. We may choose to furnish your attire, either business or clinical, or we may choose to reimburse your costs up to a set dollar amount. Surgical scrubs will be worn by those employees working in direct patient care. Also, for those assisting in direct patient care, long hair must be tied back. The business office staff’s attire should be “business-like.” Jeans or extremely casual wear, except on snow days or other special circumstances, are not permissible. Please be conservative with the use of jewelry, cosmetics, and perfumes. Please do not wear your contaminated scrub jacket out of the office.

Clinical personnel should see that their shoes are clean, well-polished, and in good condition. Clinical staff members should not wear open-toed shoes. Business staff members should wear shoes that are appropriate for a professional office. Flip flops are not permitted, with the exception of a nonpatient work day.

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Patients often equate the quality of the dentistry we provide to our appearance. While a “casual” look may be appropriate for outside the professional office, a professional look must be maintained in the office. In keeping with the image of professionalism that we wish to project to our patients, we set forth these guidelines:

- 1 ***Provocative is not professional! Blouses and tops should be conservative and professional, with no cleavage exposed.***
- 2 ***It is the policy of this practice that body art (tattoos) should not be visible to our patients. If you have body art, it must be covered by clothing at all times while in the office.***
- 3 ***Jewelry is permitted as long as it is conservative. Clinical staff members are restricted by the nature of their work, such as refraining from wearing rings which might tear gloves and breach infection control measures. Business assistants are permitted to wear jewelry as long as it is tasteful, conservative, and appropriate. Body jewelry and piercing (such as eyebrows, lips, nostrils, tongue, etc.), other than the ear lobe, is not permitted.***
- 4 ***Fingernails should be kept at a length that does not interfere with the staff member’s work. Bold colors and gaudy designs are not in keeping with the professional presence we wish to project and are therefore not permitted.***

A different scenario

Here is an example of a positive new patient experience.

The patient enters the office. The business assistant is smartly dressed in a dark jacket and white blouse. Her hair, jewelry, and make-up are neat and conservative. The business assistant anticipates his arrival and stands to greet him. With a smile on her face, she says, “Good morning, you must be Mr. Watterson. My name is Lisa, and I’m glad to meet you.” She passes a clipboard to him with the appropriate forms and thanks him for arriving early. She requests his insurance card to make a copy and offers him something to drink. The reception area is neat, organized, and stylish. The furnishings are comfortable, clean, and tasteful.

The patient thinks, “This is a great office. I think I’m going to like this place!”

The patient is not summoned by clinical staff members until he has completed the forms and returned them to the business assistant. The check-out process is equally pleasant. The patient approaches the front desk, and Lisa says, “I see that you need to return to see the doctor. Let’s see what is available. What about Monday, May 15, at 9 a.m. or Tuesday, May 16, at 2:30 p.m.?”

Notice the business assistant is in charge of the schedule and offers two options, morning and afternoon. If neither option is acceptable, the patient will tell her, and together, they will find something that is acceptable.

The assistant schedules the appointment and says, “All right, we have reserved time for your dentistry on May 16 at 2:30 p.m. Would you like to have a courtesy reminder call?” The patient indicates he does not need the call. Lisa says, “Great! I’ll make note of that in the schedule. Thank you so much for being dependable!”

If the patient had indicated he wanted to be called, Lisa would have said, “Certainly. The call will be made between the hours of 8 a.m. and 5 p.m. on Monday, May 15. Which phone number do you prefer that we call?”

Also offer to send the patient a reminder e-mail and/or text message. Be sure to get verbal permission to send text messages, because there is a charge to the patient associated with this service from the telephone company.

Lisa would then continue:

“Everything is in order with your third-party benefits, and we anticipate your insurance will cover 100% of this visit. The next visit should be covered at 50%, and we anticipate your portion of the fee will be \$200. We accept cash, check, or a bank card. Do you have any questions?”

As the patient prepares to exit, Lisa says, “Thank you so much for choosing us, and we look forward to seeing you on your next visit!”

Training for your business assistant

Standards of professionalism seasoned with grace are not traits people possess naturally. They have to be *learned*. If your business assistant lacks “polish,” there are programs designed to help her learn how to deal with people gracefully and professionally, such as Linda Miles’ two-day dental business conference (also available on DVD at www.dentalmanagementU.com). An in-office consultant also can help your assistant with patient communication skills, telephone and scheduling techniques, and various other business duties. Many of the large regional meetings have sessions devoted to education for business assistants, so make plans to take your entire team.

Business assistants are your most valuable employees when it comes to patient perception. It is your responsibility to see that they are properly trained to do their jobs and interact appropriately with your patients. Improperly trained business assistants can cause patients to leave your practice, which ultimately affects your productivity. However, with the right training, your “diamond in the rough” can turn out to be a valuable gem and a great asset to your practice! **DE**

Dianne Glasscoe-Watterson assists dental practices in achieving their highest potential through practical, effective on-site consulting. Her continuing-education courses help dental professionals refresh their knowledge base and reignite professional passion. Visit Dianne’s Web site at www.professionaldentalmgmt.com or e-mail her at dglasscoe@northstate.net.

