Case Acceptance Model

1. List the dollar amount of the recommended dentistry.

2. List all recommended procedures and whether they're cosmetic or operative dentistry.

3. Note what is going on in the client's life that will benefit from the recommended dentistry and be worth the fee. This is a list of non-clinical benefits to this particular client.

4. In order to do this, make a list of what we know for sure about this client, such as:
   A. Gender
   B. Age
   C. Marital status, with or without children
   D. Spouse's information, i.e., name, job, interests, activities
   E. What do we know about the client's life that would indicate her values or attitudes?
   F. What is the personality style of this client? This will affect our method of presentation.

5. Make some assumptions about the benefits of the recommended dentistry to the client's lifestyle.

6. Create questions to be asked which will verify your assumptions. In other words, the answers to these questions will clarify how she feels about the benefit. This will help you present the case using benefits that are real rather than assumed.

7. Once you've established these benefit questions, create the framework for the questions. Write out how you'll introduce the questions and make it in the context of the client's current situation. For example:

> *"Tina, when we met last, you mentioned that you'll be taking a test to become an insurance adjuster so you can help your husband in his line of work."*
>
> This is the context, now comes the question:
>
> *"How important to you is your first impression when you meet with clients to appraise their insurance needs?"*

Before you start the clarification process of your assumptions, it would be beneficial to ask the client if it would be all right to ask questions to help them understand the treatment that's being recommended. This makes it okay with the client to ask questions before you actually get into the discussion of the treatment plan.

By doing that, the patient will perceive "personalization" of the treatment plan. It will let them know that they have a say in the dentistry; they won't just be waiting for you to tell them what they need.

8. Once your assumptions have been clarified, it's time to present the case. This is done through making an initial benefit statement and following that with a recommendation of procedures to create the benefit. For example:

"So we can make your teeth more stable and give you an investment that's long-term, the doctor has recommended that we do . . ."

Each procedure needs to have a benefit statement go with it so the client can understand why that's being recommended.

9. Let the client hold the study model with the wax-up completed in her hands. Look directly at the client with the study models in between you. This will allow you to look at the study models and the client's face for non-verbal communications. The client's face will project clarity or confusion and we'll want to know that before moving on to another point. Confusion must be clarified immediately or it will ruin the entire presentation. Having the client hold the study models keeps them focused on what you're saying and gets their tactile, as well as their visual, senses involved.

10. Remember that at this point a fee has not been quoted.

11. Once you've presented the recommended dentistry, ask the client for a decision. This can be done as follows:

"Tina, if we can do all this that we've talked about, is there anything that would keep you from going ahead with it?"

This is a closing question. The patient will answer with one of the following objections:

A. Money

B. Time
C. Pain
D. No urgency

Each objection must be handled with the objection formula we've previously discussed and dealt with individually. Since we have not yet quoted a fee, this will probably be the first issue to come up. When the client asks for it, be ready to quote it. Now it's appropriate.

In quoting the fee, ask:
"If we could fit this into your budget comfortably, would that allow you to go ahead?"

This will draw out any objections other than money. At this point, we need to go over the available payment plans and end that discussion with:
"Assuming we can work the finances out for you, should we go ahead and schedule our first appointment?"

Points to Remember:
1. You must be prepared and not do it at the last minute. This means that you and the Client Coordinator must have ample time in advance to discuss the clinical needs of the case as well as create the questions to clarify the assumptions about the benefits to this particular client.

2. Each client is different, and when you lose sight of that, you have lower case acceptance.

3. The dentistry is not the focal point of the consult, although it's an important piece. The client needs to understand the benefits that are potentially available and be asked to talk about what those benefits will do for them. If you tell them what the benefits are, it won't be the same.

When the client identifies the benefits, they further sell themselves on the dentistry. This takes the pressure off the doctor and the Client Coordinator and makes the process more fun.