



JoAn Majors - Professional Speaker, Author, Coach, Founder

Telephone HandshakeSM: Instructions

Welcome to the DBC video training, Telephone HandshakeSM series. We want to provide the best instructions that will allow you and your team to take the new material and use it to better serve your patients and others in your circle of influence. This video is the bedrock to all of the training videos in this series. It shares our value of Open Armed Communication first. At DBC we believe that no matter what we teach we must be able to convert a caller to a happy paying patient who values the care and the character of the people in the dental practice. This is the patient who refers and becomes what we at DBC call an LLCSM, a Life Long Connection!

We're glad you're here. Let's get started!

First - Schedule at least a one hour to an hour and a half team meeting for this video and training. This is meeting time....not eating time. (It's a good idea to schedule your second meeting date/time at this point.) Depending on how many team members you have, this could take longer. Generally when you pair team members, one hour is sufficient for about eight team members. If you are part of the LLC group -your coach will advise the time needed. **As a general rule, we suggest one month, four meetings for Telephone Handshake Beginner and Intermediate to be implemented into the practice, again this depends on the number of team members. Ask your coach or our enthusiastic team for input. We're here to help!*

Second – Doctor or Manager preview the videos

1. Telephone HandshakeSM - Introduction
2. Telephone HandshakeSM - Beginner

Third – download and print the training materials - pdf document for the Telephone HandshakeSM - Beginner

Print one copy for all participants

Fourth – Print Telephone HandshakeSM Beginner Call Form

print 2 for each participant

“Real People, Really In Dentistry!”



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Meeting Agenda 1 –Telephone HandshakeSM Series - Beginner

Week 1

View Videos

1. Telephone HandshakeSM - Introduction
2. Telephone HandshakeSM - Beginner

If this is your first time hearing the information, discuss the concept in the meeting. Do the actual role plays in the next meeting.

Role Play Rules: *Be kind, be trusted. Some of you may have role played before and some have not. When you role play remember the VFP – valuable final product. The VFP of role play is to be more confident with new skills by learning and preparing in front of a group you trust. It is natural to laugh, this is why we position the chairs of the role play partners where you cannot look at each other but will easily look at the paper/instructions with the script that you are following. This allows you to focus on the material - not yourselves, nerves or other interruptions. Position chairs back to back.*

1. Role Play –

- a. When possible pair clinical with admin team member
- b. Position yourselves for the role play

2. Practice the answering of the phone and use the Beginner Call Form 2 times each.

3. Answer these questions as a group (depending on size and time) or with your partner:

- a. What was the hardest part about the script?
- b. What was the easiest part about the script?
- c. What will I do differently next time?

4. As you begin to implement this week, remember to place the beginner sheet near every phone in the practice making it easy for anyone to get started with the new caller. Work diligently this week to be comfortable saying, “you’ve come to the right place” or “you’re in the right place” with confidence. Once you begin to say this more and more and believe this, it will be a bedrock part of your communication. Even saying it to each other as you prepare for the day, clean the instruments or pass in the hall (of course not with a patient in earshot) will allow you to find your language and value the material. Now, let’s go serve with Open Arms!

5. Share the next meeting date/time.

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Meeting Agenda 2 –Telephone HandshakeSM Series - Beginner

Week 2

All team members should have completed Week 1 of the beginner call series using the form provided. It is a good idea to view video(s) again at this point.

Discuss what you experienced this past week and how you have improved implementing this concept into the practice.

1. Role Play –

- a. Choose a different partner than last week
- b. When possible pair clinical with admin team member
- c. Position yourselves for the role play

2. Practice the answering of the phone and use the Beginner Call Form 2 times with each other. Remember asking questions from the caller helps you understand what that patient is wanting from the dental practice.

3. Answer these questions as a group (depending on size and time) or with your partner:

- a. What was the hardest part about the script?
- b. What was the easiest part about the script?
- c. What will I do differently next time?
- d. Did you have any special feedback with any of the callers using this technique? Please share.

4. As you continue using the Telephone HandshakeSM this week:

- a. Keep a copy for the new patient calls you took care of.
- b. Have one team member share in the next day huddle: a) What felt good; b) What was awkward; c) What will you do next time
- c. Save your call sheets and bring to the next meeting to share. Now, let's go serve with Open Arms!

5. Discuss your next step and meeting.

Want to learn more from JoAn! Use the voucher on the next page to see her live for a 2-day course or visit the video library on her website! www.joanmajors.com

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TELEPHONE HANDSHAKESM
BEGINNER CALL FORM/at all phones in office

Date: _____ Team Member: _____
_____ Adult _____ Child _____ Age
Appt Day: _____ Time: _____

INCOMING CALL, ALWAYS SMILE!:

- “Thank you for calling _____. This is _____.”

DIRECT QUESTIONS: “I need to make an appointment for a cleaning – to get a tooth pulled...etc”

Unsure if this person is a patient of record. Ask the next question. If certain, they are new skip to following.

- o “How long has it been since you have been to our practice?” _____ (proceed accordingly)

NEW PATIENT:

- “Let me first say, you’ve called the right place. My name is _____ and yours is _____.”
- “In case we should get disconnected, may I please get a call back number?” _____
- “How did you hear about our doctor/practice/office?” _____
- If a question was asked, answer appropriately or ask “What is it you’ve heard about _____?”
OR “How far along in your research about _____ are you?” _____

Transfer of Power (If patient of record – skip to this question)

- “May I place you on a brief hold so you can speak to “_____,” our new patient coordinator, she will be able to answer all your questions and make your appointment, how does that sound?

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