The Perfect Recall System

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The Perfect Recall System

- Pre-appoint 100% of all recall patients
- Never have a cancellation
- Never have a no-show

Simple... right???
Okay, we lied a little...
“The Perfect Recall System” Doesn't Exist

YET...
Patients are human beings

1. All patients don't respond in the same way to the same message.
2. Each patient will respond differently to the same message at different times.

Sound familiar?
Two parts to recall

1. The PRE-APPOINTED hygiene patient who schedules their next recall at the end of every completed hygiene visit.

2. The UNSCHEDULED hygiene patient
   - Did not pre-appoint (for whatever reason)
   - Had to cancel a pre-appointed visit
   - The dreaded No-show
The Pre-Appointed Patient

- The BEST kind of recall patient
- 85% or higher should be your goal
- Your pre-appointment % is likely a LOT lower than you think!

These patients are NOT our topic of discussion today.
The Unscheduled Patient

- The patients we worry about “getting away”
- The patients we have to WORK the hardest to keep on schedule.

*Your “Perfect Recall System” is deciding the best way *(for your practice)* to schedule these patients.*
Human Factor #1

- All patients don't respond in the same way to the same message.
  - Message Types
    - Postcard?
    - Phone call?
    - E-mail?
    - Text Message?
    - Letter?
    - Taxi?
Message Content

- The simple reminder
- Humor
- Sincere concern
- Re-enforcement of risks
  - Heart health
  - Periodontal disease
  - Other Tx concerns
## Message Types

<table>
<thead>
<tr>
<th>Type</th>
<th>Cost</th>
<th>Deliverability</th>
<th>Content</th>
<th>Ideal Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>$0</td>
<td>0% to 90% (rare!!!)</td>
<td>Unlimited</td>
<td>Scheduled appt. w/o a phone call (2)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Average: 46% (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text Message</td>
<td>$0</td>
<td>0% to 90% (rare!!!)</td>
<td>140 characters</td>
<td>Return phone call (3)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Average: 43% (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postcard</td>
<td>$0.56</td>
<td>98 - 99%</td>
<td>4 - 6 sentences</td>
<td>Return phone call (3)</td>
</tr>
<tr>
<td>Letter</td>
<td>$0.89</td>
<td>98 - 99%</td>
<td>4 - 6 paragraphs</td>
<td>Return phone call (3)</td>
</tr>
<tr>
<td>Phone Call</td>
<td>???</td>
<td>Leave msg: 95%?</td>
<td>Message: short</td>
<td>Return phone call (3)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Talk to ptn: 20-30%</td>
<td>Conversation: long</td>
<td>Schedule appt.</td>
</tr>
</tbody>
</table>

(1) Among our 500 clients, 1.1 million active patients

(2) Patient completes webform, office schedules appt., PLZ automatically sends “Save the Date” email - NO PHONE CALLS NEEDED!

(3) Risk of “phone tag” before finally connecting
• Each patient will respond differently to the same message at different times.
  – *Timing is everything!*
Perfect Message Timing

• The patient has time to respond
• The patient didn't just spend $2500 getting a new transmission
• The patient's child isn't on the All Star team getting ready to go to something called "Nationals"
• The patient doesn't have a single other thing in their life that is more important than their next visit to see you!
And of course,

you know exactly when that time is,

RIGHT?
Timing is everything...

- Need a plan to contact patients
  - Several different times
  - With several different message types
  - Over several months time
Your Perfect Recall System

- Eventually, the right message will arrive at the right time for most patients
- Be content to allow some patients to GO!
LEGOS!

One box, thousands of possibilities...
A “Typical” Practice

- One doctor
- One to two hygienists
A “Typical” Scenario

• Pre-appoint approximately 60-80%
• Must use all of the “Legos” at our disposal
What kind of Practice?

- New vs. Established
- Jam-packed schedule vs. lots of openings
- High touch vs. high volume
- Rural vs. Urban
- Age demographics
LEGOS!
High tech IS High touch!
The “Low Hanging Fruit”

Pick the easiest apples first...
A little higher

Then the apples that need a little more effort...
The greatest effort

Then, do what *is appropriate* to harvest the rest!
Work “smarter not harder”

- Allow the “High Tech” legos to make an attempt before you climb that ladder!
- Only work as hard as:
  - Your Practice Philosophy dictates
  - You NEED to!
Things to consider

- Packed schedule vs. a lot of openings
- High % of cell numbers vs. e-mails
- High dental IQ of patients vs. low dental IQ
Recall notices

- Coming Due email (3 weeks before recall due date)
- Coming Due postcard (2 weeks before recall due date)

- 30 Days Past Due email (3 weeks after recall due date)
- email to YOU: "Call patient - 30 days past due" (4 weeks after recall due date)
- 30 Days Past Due postcard (kids) (5 weeks after recall due date)
- 30 Days Past Due letter (adults) (5 weeks after recall due date)

- 60 Days Past Due email (8 weeks after recall due date)
- email to YOU: "Call patient - 60 days past due" (9 weeks after recall due date)
- 60 Days Past Due postcard (kids) (10 weeks after recall due date)
- 60 Days Past Due letter (adults) (10 weeks after recall due date)

- 90 Days Past Due email (13 weeks after recall due date)
- email to YOU: "Call patient - 90 days past due" (14 weeks after recall due date)
- 90 Days Past Due postcard (kids) (15 weeks after recall due date)
- 90 Days Past Due letter (adults) (15 weeks after recall due date)
What are you doing now?

- **PLZ Users**
  - Go to your PLZ Portal, and login
  - Go to MESSAGES – “Message Schedule and Template Viewer”
  - Click on the [+] next to Recall Notices

- **Non-PLZ Users**
  - Postcards 1-2 times per month?
  - Endless list of phone calls to make?
  - You're likely working too hard!
Final thoughts...

- There is no “Perfect System”
  - We can NEVER achieve 100% patient retention... and that's OKAY!
- There are NO magic words
  - Don't get “hung up” on what the messages say!
- There is NO magic timing
  - Don't fret about the timing
Thanks everyone!

Q & A