

The 10 Ps of The Perfect Consult

PRESENTED BY DR. KYLE FAGALA



01. The People

If the right people aren't on your bus, you cannot have great team culture, and thus, you cannot be as successful at consults as you could be. Don't forget that patients are people too. Find as many ways as possible to market to new patients so that your exam chairs stay full.



02. The Preparation

Be prepared before new patients ever arrive at your office. Optimize your systems, dial in your fee schedule and insurance details, market your practice and your doctor(s) to patients before they ever arrive, give them a tour of your office when they do, make sure your exam room supports the sales process, and review the patient's records (and name) before going into the room.



03. The Pleasantries

Be sure to make a great first impression at each step in the process. The front desk should greet the patient when they arrive, the TC should be warm and welcoming throughout, and the doctor's primary goal should be to get to know the patient and connect on some level, adjusting as needed to the patient and/or parent's personality.



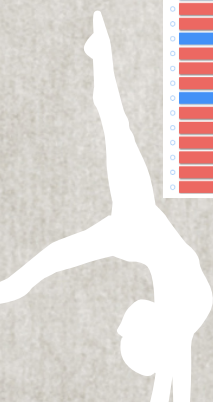
04. The Program

Don't forget that this is likely the patient and/or parent's first time in an Orthodontic office. As such, it's important to explain exactly what you plan to do during the exam and then get their permission to begin. This is also a great time to explain what questions they'll be able to direct to the TC once you finish your portion of the consult.



05. The Problem

What is the patient's chief complaint? This is perhaps the most important part of the consult. It is imperative that you understand what they want from orthodontic treatment and why they scheduled a consult in the first place. Make sure you address that problem during the exam.



07. The Plan

08. The Pause

09. The Pass Off

10. The Prayer

Ava's Pending

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Name	Date Due	Assigned User	Progress	
	10/10/2022	Melissa Longren	Pending	
	10/10/2022	Melissa Longren	Pending	
	10/10/2022	Melissa Longren	Pending	
	10/10/2022	Marshall Sims	Done	
	10/10/2022	Melissa Longren	Pending	
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	10/10/2022	Melissa Longren	Pending	
	10/10/2022	Marshall Sims	Not	
	10/10/2022	Melissa Longren	Pending	
	10/10/2022	Marshall Sims	Not	
	10/10/2022	Marshall Sims	Not	

Bonus: The Pursuit

Not every patient will say "yes" to treatment that day. For these patients, you need a consistent and trackable system in place for follow-up. While there is no such thing as a "perfect" consult, each process in your practice can be improved upon with regular time and attention.

