



Consultative Case Presentation Skills

Mastering case presentation skills provides the opportunity for dental team members to do what they do best – great dentistry. The flow of information, starting with the dental assistant or hygienist, sets the tone for conversation to follow. An engaged patient is more likely to ask questions, elevate their oral health knowledge and proceed with – even get excited about – treatment options. Likewise, a patient who has been “told” options without engagement is less likely to pursue treatment. Patients tend to make healthcare decisions based on their perception of the provider’s attentiveness and perceived ability to meet their needs.

Mastering the presentation, in a hectic daily schedule, demands a different mindset. Dental auxiliaries learn to process quickly, learning what the Doctor needs next without a word exchanged between them. While completing a procedure, they are already mentally setting up for the next one! This skill is highly valued by the Dentist and an efficient use of time.

Now comes case presentation – multitasking takes a back seat to full engagement with the patient. To be successful:

1. Maintain eye contact.
2. Don’t allow distractions from outside the operatory.
3. Pay full attention to the patient.

Listening to the patient describe a dental challenge without providing an immediate answer is often difficult for dental personnel. However, providing solutions or quickly summarizing the patient’s concern without allowing the patient an opportunity to express the impact of the challenge will diminish case acceptance. There are three distinct types of case presentations:

1. Offer solutions to expressed challenges, such as a sensitive or broken tooth.
2. Identify and provide cosmetic options not expressed by the patient.
3. Provide insights into future dental needs.

CONSIDER THE GUIDELINES BELOW TO ENHANCE CASE PRESENTATION SKILLS FOR EACH SCENARIO.

Dental Challenge Expressed by the Patient

- Plan to listen 80% of the time and talk 20% of time during this process.



- Listen, reiterate, and ask clarifying questions.
 - » *“To make sure I understand correctly, you have cold sensitivity on the upper right, possibly one of the last 2 teeth, that occurs almost daily?”*
 - » *“How long have you noticed these symptoms?”*
 - » *“Is this impacting food choices, or are you trying to avoid eating on the right side?”*
- Know the patient’s history prior to this conversation, and weave that history into your dialogue.
 - » *“We placed two fillings in the upper right area almost 6 months ago. Did these symptoms start after the fillings?”*
 - » *“We have been monitoring recession in that area for some time; let me check the measurements and see if there has been any change.”*
- Take your time to gather the data the Dentist will need for a diagnosis, and let the patient know what you are testing and why to keep them engaged in the solution process.
- When the Dentist enters the operator, the patient should feel almost as if they are “co-diagnosing.”



Cosmetic Options Not Expressed By the Patient

There are times when patients are simply unaware of cosmetic options they would benefit from. Dental auxiliaries fill this gap by maintaining the role of a patient advocate. A patient advocate identifies, without pressuring or “up-selling” the patient, opportunities to improve their smile. In fact, patients count on the dental team to fill this role. The goal is to create an awareness, solicit interest, move to a decision through options, and finally provide the treatment.

Integrate the following to enhance your case acceptance:

- Identify cosmetic options that would enhance the patient’s teeth/smile. An example of this type of conversation:
 - » *“_____, do you notice one of your front teeth looks longer than the other? Let me show you what I see in the mirror.” Provide a hand mirror and look together with the patient.*



This statement creates the awareness

- » *“Dr. _____ changes things like this all the time to make the smile line even again.”*

This statement reassures the patient that many people experience this type of uneven wear and the Doctor is experienced in providing this type of treatment.

- » *“Please know you have a beautiful smile regardless; this may not be a concern for you.”*

This statement removes the tendency for a patient to become defensive or feel uncomfortable about a flaw in their appearance.

- » *“I will mention it to Dr. _____, and he/she can at least let you know what options you have and what the financial investment would be if you choose to change this in the future.”*

This statement provides a comfortable approach to hearing options without feeling pressured.

- » *“Does that sound all right to you?”*

This statement returns control to the patient. If they are not interested, you will not waste exam time discussing it.

- The dental auxiliary remains in the patient advocate role while the Doctor assumes the problem solver role. The transition of information, if done correctly, lets the Doctor know the patient may be interested in seeking solutions. The exchange of information is in a triangular format with eye contact between all three parties – the patient, the auxiliary and the Dentist. Resist the temptation to talk behind the patient’s back. Move forward in the operatory to keep the patient engaged for this transition.
 - » *“Dr. _____, as you know, _____ has a beautiful smile. As part of her exam, she would be interested in hearing options to correct the length discrepancy between her front two teeth. She may or may not want to pursue treatment, but she would at least like to know what the options are if she chooses to change this in the future.”*

The transition removes defensiveness with a compliment about her smile.

You keep the Doctor in the problem solving role.

The patient does not feel pressured; after all, they are simply hearing options.



You include the patient in the discussion by creating a triangular communication style with everyone in eye contact. This supports the patient's sense of inclusion and co-diagnosis approach.

Future Dental Needs

Wouldn't everyone like a crystal ball to look into the future? Think of the planning potential! Dentists can provide insight for patients to allow them to prepare for future dental needs. Identify older fillings or fractured teeth that may need crowns down the road. It is helpful for patients to be able to "look into the future" to best utilize resources and insurance benefits for their dental needs. The patient may choose to proceed with some treatment in an effort to reduce large dental expenses later. This is especially helpful for patients who plan to retire in the next 5 years.

A consultative case presentation approach takes practice. In a fast-paced environment, dental teams learn to utilize close-ended questions in order to process quickly. Open-ended questions are the hallmark for patient engagement. Close-ended questions force a yes or no answer for quick processing. Open-ended questions start a dialogue that is ideal for case presentation. There is a definite use for close-ended questioning, such as "Are there any changes to your health?" These questions let you move quickly through segments of the appointment. However, using close-ended questions during case presentation interviewing will stop the dialogue, ending your ability to move the Doctor into a problem-solving role.

Examples

- » **Close-ended question:** "Do you want to fill the space on the lower right where you are missing a tooth?"

- » **Open-ended question:** "How has that space on the lower right impacted you?"

Achieve patient engagement, prove to be an attentive provider who listens, then create tangible value for the options discussed. The goal is to remove fear the patient may have regarding the success rate for treatment. Let them know you are capable of meeting the desirable outcome. Create tangible value through visual aids:

- Digital images (x-rays)
- Intraoral Photos
- Before and After Photos
- Models
- Brochures



Enjoy exploring communication skills that allow greater connections and trust with the patient base. Improving communication skills is as important to the success of the practice as improving clinical skills. Implementing subtle changes in communication patterns will increase case acceptance and overall patient and staff satisfaction. For greatest traction, Dentists can share this article with the team and plan to discuss how to incorporate these communication techniques at your next staff meeting.