

2026 ANNUAL MEETING

CFDDA

Unravel the Mystery of Treatment Acceptance:



*Practical strategies to motivate teams, elevate patient care,
and grow practice success!*



Presented by:

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Here's a guide for you and your team. This program has been organized to assist you in planning to change the way you practice and even change your life! If you truly want to become more fulfilled in dentistry you can do it. Not one thing we'll discuss is beyond your ability. It just requires that you make the decision to do it.

Current Patient Trends for the Complete Care Dental Practice

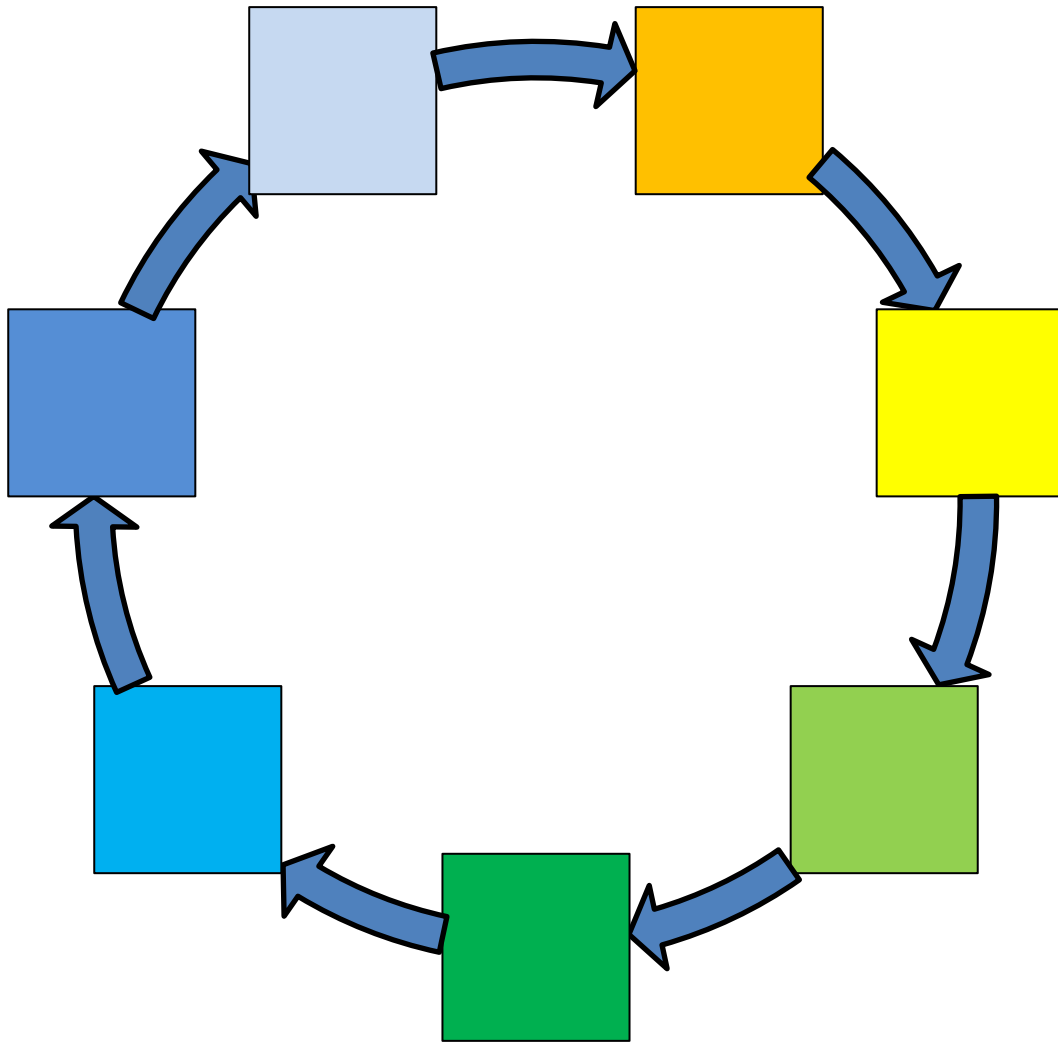
1. _____ performance.
2. _____ service.
3. _____ experience.
4. No _____ on _____.
5. _____ possible _____.
6. The _____ health care _____.

Professional Service from a Patient's Point of View

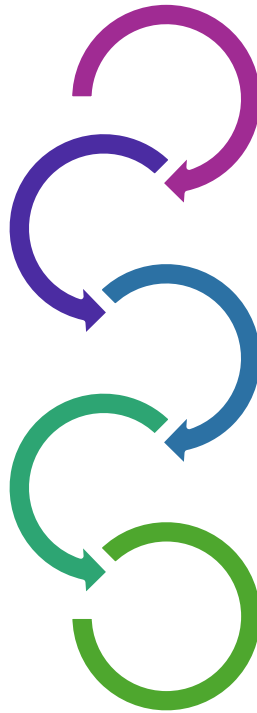
1. The staff _____ that they want to be at work in your practice.
2. Someone is _____ available to answer questions.
3. The office is _____.
4. The office is _____ to find.
5. The staff is _____ and know the procedures performed by the dentist and hygienist.
6. The clinical and business office staff are _____ dressed and look _____.

Notes _____

The Treatment Acceptance Cycle



Treatment Acceptance Formula



Post Treatment Conference

- 1. Looks _____
- 2. Feels _____
- 3. Keep _____
- 4. Lasts _____
- 5. Encourage _____

Notes: _____

Morning Game Plan Meeting

The morning game plan should begin 15 minutes before the first patient's appointment. It is the responsibility of each team player to be on time and to join the meeting with a positive, energetic, **winning** attitude.

- A. Thought for the day/Exceptional performance.
- B. If this is the first morning meeting of the week:
 - 1. What are the weekly goals for the practice?
 - 2. What do we expect to accomplish this week?
 - 3. What general announcements need to be made? *i.e., We are working a short week to attend a continuing education course.*
- C. What is our goal to date, and how much have we achieved?
- D. What is planned for today? (Today's goals and today's patient schedule/services).
- E. Save the Day strategies.
- F. Who are the new patients today?
- G. Are any patients having financial or collection problems?
- H. Who should we thank today for a recent referral?
- I. Do any patients have special clinical or psychological concerns?
- J. If we have an emergency, when is the best time to schedule their visit today?
- K. Which hygiene patients should be reevaluated, have incomplete treatment, or are due to update FMX/PAN?
- L. Which patients need a post-treatment conference?
- M. Who were the patients on our "TLC" phone call list yesterday?
- N. Repeat thought for the day/Exceptional performance

ESSENTIAL: *For game plan meetings to be effective, all staff should be present with today's patient charts or records, tickler notes, financial information, and copies of the schedule for all to see. Be aware of lab work being back early, the schedule should be available for everyone to view, and wear name tags!*

Notes: _____

New Patient Examination Administrative Review

1. Be ready to greet patients and introduce yourself as they enter the office.
2. Briefly explain “who is who” at the business office and who has access to the patient’s records.
3. Acknowledge source of referral. If another person, specifically mention that you will be sure to thank them.
4. Explain your role as the treatment coordinator.
5. Provide patient with a tour of the office.
 - point out the patient bathroom, reception area, consultation area, etc.
 - indicate the operatories where the doctor/hygienist practice
 - tell about the lab where “Doctor prepares any cases he may be working on for you.”
 - Specifically mention the sterilization area and how the doctor is in “strict compliance with all OSHA regulations.”
6. Review or acknowledge the patient’s primary concern from your VIP conversation when the patient first called the office.
7. Review patient paperwork. Verify that all questions have been answered.
 - patient registration form
 - medical history form
 - mention available payment options
8. Review office policies:
 - regular schedule/emergencies
 - hygiene recare
 - broken or changed appointments
 - insurance (if necessary)
 - financial arrangements, monthly payment options available
9. Introduce the doctor to the patient and relay (in front of the patient) any additional information given to you by the patient not included on the VIP Slip.

New Patient Administrative Review Conversation

Ms. Smith, once again, let me welcome you to our dental family. We really enjoy seeing new patients.

I was disappointed to hear about your tooth. Has anything else occurred since we last spoke?

-OR- (depending on what is listed on the VIP Slip)

I was glad to hear you were looking for a new dentist and gave us a call. We're going to work hard to gain your confidence.

It was also great to learn that you found out about us from Ms. Jones. We just love her. I'll be sure to personally thank her next time we meet.

I have reviewed the forms you have filled out. Everything has been completed. (If not, have the patient answer those questions and/or sign the form)

Before Dr. _____ arrives, let me take this opportunity to explain how things get done around here.

I am Dr. _____'s Treatment Coordinator, and what that means is I am responsible for his/her schedule and making payment arrangements for patients who are having treatment completed.

Our patients tell us they really like the fact that we are on time and keep to a schedule. So we'll expect you to make the appropriate arrangements to be here on time as well.

If you should ever require emergency care, Dr. _____ can be reached 24 hours a day through our main number. Just follow the instructions, and we'll get right back to you.

All of our patients schedule their next appointment before they leave, so to make sure you get the first available appointment, we'll ask you to do the same.

I know that sometimes things are unavoidable and appointments have to be changed. If this should occur, we ask our patients to provide us with 2 business days' notice.

Dr. _____ will never begin treatment until he/she has the opportunity to talk to you first and answer your questions. Our patients really like this too, because this way we can let you know the fee for your treatment and review your insurance coverage.

If you are interested, we even have a monthly payment option that our patients tell us is very helpful.

Oh look, here is Dr. _____...

Pre-clinical interview

Keep in mind, you are here to help patients be as healthy as they want to be.

Find out what the patient has been doing. Learn the patient’s dental history

- “Tell me what dentistry you have done in the past?”*
- “What have you and your previous dentist been talking about?”*
- “I would be interested to know how you came to decide on”*
- “Is there anything else we have not discussed?”*
- “What happened?” “When did you first notice...?” “How has this affected you?” “What were you doing when this happened?”*

Is there something they have been looking for and have not yet found in dental care?

- “What reasons do you think have kept you from finding . . . ?”*
- “How are you approaching this now?” “What have you tried so far?”*

Determine what they are interested in learning? How open are they to new ideas?

- “Has anyone ever explained to you why this has been happening to you?”*
- “If I see anything in your mouth that I know will cause problems for you in the future, I would like to discuss them with you without holding anything back. Would that be all right with you?”*

What is most important to them now? Where do they feel they are in these areas? Can they rate the condition?

- “What is most important to you now?” “Can you rate yourself?” What do you think would have to change?”*

What degree of intent is there by the patient to do (or pay) whatever it takes to get their mouth healthy again? Do they have a budget? How much of a concern will the fee be to them?

- “Have you thought about how you would pay for this?”*
- “Has anyone ever explained to you how expensive this may become?”*

Is there anyone else who will help them make this decision?

- “At our next visit, we will discuss treatment recommendations for you, and if you would like, you are welcome to bring your spouse. Would you like him/her to be here?”*

NOTES: _____

Treatment Presentation Outline

Adopted from Peter Dawson, D.D.S., “No Lose Treatment Presentation”

☛ Be Prepared

- Have the end result in mind.
- Review VIP slip, new patient interview notes, study models, x-rays, pictures.

☛ Think Only in Terms of Optimum Oral Health

- Oral health that can be maintained.
- Take away anything that causes further breakdown.

“If having the kind of dentistry that you should have, creates a problem, let’s talk about it.”

☛ Review What You Saw During the Exam

- Review the good along with the problems.
- Until they understand the problems they cannot understand the implications.

☛ Relate Exam Findings to Your Further Study of Radiographs, Models, Pictures, etc.

☛ Help Patient Understand How Each Problem Can Be Solved

“To get your mouth healthy and to keep it that way . . .”

Explain Why You Chose Specific Treatment Over Any Alternatives

- When they call back to cancel its because they did not know they had options.

“Let me help you understand . . .”

“I have only considered what would be best for you . . .”

☛ Present Only One Treatment Plan

“This is what you should do if you can . . .”

☛ Explain the Probable Prognosis if the Treatment Plan is Not Followed

“This is what will happen if you do not do what you should . . .”

- Discuss what would cause tooth loss.

☛ Probe for Any and All Objections and Concerns

“I do not want this to create a bigger problem than you already have in your mouth.”

“Some of my patients are able to complete their treatment all at once...they have the time and money right now. Many others have to do this over time and we could talk about doing the same for you.”

☞ **Work out Alternatives Only if Needed - Be Empathetic**

“Can we talk about where would be the right place to start?”

“There are lots of things that you need over the long haul and some we can buy time on.”

☞ **Present the Total Fee After Treatment is understood**

“How does this work for you?”

“How does this sound?”

“Does this create a problem for you?”

“I’d like to talk to you about what the next steps that should be taken...”

“What do you think our next step should be...”

☞ **Have Staff Person Discuss Financial Arrangements**

- If Doctor plans the financial arrangements, the Doctor collects the money.

Final Note:

☞ **Create Value for Each Step**

☞ **Discuss:** **Why You Do What You Do**
 Why it Works
 Why it looks Natural and Life-Like
 Why They’ll Love it

☞ **Explain:** **How you’ll do this**

Answer Patient Questions with Answers Relative to Their Situation, i.e., loose teeth, bleeding gums, worn teeth, missing teeth, etc.

“When you first came in, it was because a tooth was bothering you. Then when we reviewed pictures of your teeth, you realized how much you didn’t like the way the ones in front looked. You commented how they have gotten shorter over the years. By reading your x-rays I also discovered decay in between some of your teeth as well.”

“I’m not surprised this tooth has been bothering you because your bite is uneven and the tooth above it is knocking into it. This is causing the sensitivity you’re experiencing. Left untreated you can expect more of the same until something gives. Like one of the teeth breaking to get out of the way. Your bite is also what is causing your front teeth to wear away making them shorter which is why you can’t see them when you smile.”

“Adjusting your bite will stop the sensitivity and keep your teeth from wearing away any further. Placing a restoration on your front teeth will give you back the shape you remember and removing the decay from in-between your teeth means they’ll be more comfortable too and greatly reduces the risk of losing them.”



Larry M. Guzzardo

Larry began his 25-year career as a training specialist, where he delivered in-house training programs such as **active listening, customer service, stress management, and career development**. Since turning to full-time dental consulting years ago, he has focused his talents and experience exclusively on dental practice management, business systems, and leadership development. He conducts in-office practice management consultations designed to enhance trust, create organization, increase profits, and build patient relationships that last.

Larry has co-authored two books, “Powerful Practice” and “Getting Things Done”. He has also presented numerous workshops, including “Winning Patient Acceptance,” “Business Communication Systems,” and “The Leadership Challenge.”

Larry has spoken to professionals across the United States, Canada, the United Kingdom and even Europe and the Middle East on Practice Management, having received the Speaker’s Appreciation Award from several organizations, including the **American Academy of Cosmetic Dentistry, Florida National Dental Congress, California Dental Association, Chicago Dental Society-Midwinter Meeting** and the **National University of Mexico**, as well as a Certificate of Appreciation from the **Georgia Dental Association** and has earned a Certificate of Recognition from the **American Dental Association**. The **Hinman Dental Society** has also presented Larry with Certificates of Appreciation for his table clinic presentations.

He also serves as a member of the visiting faculty at the **Dawson Academy**, where he teaches patient communication and practice management techniques. He is also the Head Instructor for the **All-Star Dental Academy**. Larry is certified to administer the **DiSC Personality Profile** and is certified as a **Standard Operating Procedures (SOP’s) Consultant**. He is a member and past secretary of the **Academy of Dental Management Consultants** and has contributed articles for various publications. Larry actively promotes adult literacy in the community by volunteering as a member of the Board of Directors for Project READ, serving as chairman of the program development committee.