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## Right Seat On The Dental Office Bus

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Have you ever thought about the cost to your practice when team members are not in the right seat on the bus? What if they are not on the bus at all? They are going some other place, not the same direction as you, so you keep driving forward by yourself, struggling and frustrated. How do you figure out what the right seat on the bus is for each individual—learning who should do what?

Job descriptions are a solid beginning. Sit down and organize your operation. Think about what each person needs to manage, what their responsibilities and resulting task list would be, and maybe what you want them to handle overall. Next, evaluate the people that work for

you. What are their strengths and weaknesses? If you are hiring, you must identify these strength and weaknesses during the interview with leading questions, evaluating a potential new hire by their responses and behavior.

Why is this important? It is well understood that people will avoid doing things they don't want to do or things that they are not good at, because these things cause stress that is more difficult for them to handle—whereas stress doing things a person enjoys or may be good at will be easier for them to handle effectively, repeatedly. As a result, things will not get done, or they will be done carelessly. It becomes a struggle instead of being work they can be proud of.

While few people are a perfect fit for any position, here are positions in the dental office environment where having the right person in the right seat on the bus is very important.

- 1) Answering the phone
- 2) Treatment presentation and financial agreements
- 3) Collections

**1) Answering the phone.** This task is crucial to the dental business, or any business where clients or patients will be dealt with regularly on the telephone. It is an important reflection of your operation, a place where many people, patients and other professionals alike, will make their first impression of you and your practice. Anyone regularly working on the telephone needs certain qualities in order to succeed as a primary face (voice!) for your dental practice.

- a) **Tone:** Think about what you would want from someone greeting you in person or on the phone. You want them to be cheerful, friendly, compassionate, empathetic. Any other mannerisms relay rudeness and an “I don't care” attitude, which is the last thing you want.
- b) **Articulation:** You want the person to be able to clearly communicate on the phone or from behind the desk. Lack of proper articulation may present as lack of professionalism, but clarity is even more important.
- c) **Communication:** The person needs to be able to communicate properly with the public. Exchange of knowledge is very important as miscommunication leads to angry patients, bad reviews, and even litigation. People on both sides of the equation must have the same full understanding of what is being communicated.
- d) **Knowledge:** A profound understanding of the dental field is necessary, as patients have many questions. Not being able to answer patient's questions presents as a weakness and inability to control the situation; patients lose confidence if they are left feeling like they didn't get what they needed. On the opposite side, patients will rave about you and your staff when they can stand on rock-solid confidence in you and the people you work for knowing what they're talking about and being able to share that knowledge effectively.
- e) **Detail-oriented data gathering:** Attention to detail is crucial as billing depends on information obtained from the patient and the schedule, and the Doctor's paycheck depends on the preciseness of the details that comprise these areas.

Ensuring that loose ends are handled prevents issues with patients and unnecessary stress regarding financial aspects of the practice.

**2) Treatment presentation and financial agreements.** This task is necessary to secure tomorrow. It is the contract between two parties and outlines rules of the game. These people must be teachers, salespeople, and good listeners with a strong enough personality to handle the public in potentially stressful situations. There are several key areas of the skillset necessary for success in this position.

- a) Understanding sales: The person needs to know that dental service is the sale of a commodity. These are usually health decisions but to patients they feel like elective procedures, more effort is placed on relaying value to the patient to support the buying decision. The skill and experience to provide quick, effective answers to patient objections is a must or the salesman will get buried by the buyer.
- b) Understanding insurance plans: Knowledge of the ins and out of insurance plans and how and where to find the information needed is fundamental to this position. We can no longer avoid the insurance questions and the patient's buying decision dependency on insurance. Knowledge is power to help the patient proceed with treatment and to set expectations for the benefit reimbursement and patient's responsibility.
- c) Psychology of dealing with different personalities: It takes skill to know how to deal with different personalities and be able to effectively communicate the same message to different buyers. This makes or breaks deals. People buy from people they like. Speaking the buyer's 'language'; being calm, pleasant and clear at all times; and being prepared to avoid escalating potentially volatile situations are all necessary to close the deal and secure the future schedule of the practice.
- d) Being a neutral advocate for both the provider and for the patient: Too often the treatment coordinators feel sorry for the patient and their situation and so they back down from presenting the treatment, or from collections activity, because of discomfort. The person needs to clearly present facts on behalf of the provider and still be empathetic to the patient's situation.
- e) Math skills: Obviously, presenting financial agreements requires one to possess math skills. This is too often taken for granted but mistakes can be costly. Mistakes in the amount to collect at time of service, computation of the bottom line, or estimations of insurance contribution are costly to the provider and produce an angry patient, which can be even more costly.

**3) Collections.** This task is the heartbeat and lifeline of the practice; while we often think of the unpleasant aspects of collections, we are talking simply about the skill of collecting revenue due from patients, rather than handling delinquent accounts (although that's part of the process). It affects cash flow, the health and survival of business operations. Here are some traits necessary for the position.

- a) Confidence in dealing with someone else's wallet: Not being hesitant to discuss the provider fees promotes a sense of value on both sides as well as treatment plan acceptance.
- b) Dedication and diligence: Consistency in the office's collections system and protocols, statements and phone calls to reduces the debt owed to the office and unnecessary collections activity on delinquent accounts.
- c) Strong belief in prevention of rising accounts receivables: Having the best interests of the practice at all times and doing everything possible to ensure that patients pay at time of service prevents many future unpleasant situations. This includes accurate insurance estimations, signed financial agreements, and requests to settle balances from patients.
- d) Understanding the needs of both the practice and the patient: This echoes the needs given in the previous section. A strong but kind and empathetic personality helps make collections go more smoothly. We can't squeeze blood from a stone, but blood is still needed!

It is easy to see how for each of these overall areas, there is much overlap in skillset, and with diligence and experience you can carefully determine who is best suited for which tasks. Some skills can be cultivated with experience in a few weeks, and some—such as empathy—cannot, but if you get everyone into the right seat on the bus, you will have a happier, healthier practice. Everyone benefits from that.

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