




Nova Scotia Dental Association
 210 Waterfront Drive, Suite 101
 Bedford, NS B4A 0H3
www.nsdental.org

 
 Tel: 902 420 0088
 Fax: 902 420 6537
 Email: nsda@eastlink.ca

Practice Management Articles



The Financial Conversation: Ask the right questions

- Lisa Philp, TGNA

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One of the most important discussions dental teams have with patients is the financial conversation. During this conversation, dental teams do their best to help patients get care by helping them understand their financial responsibilities and payment options. Great financial conversations don't just happen. They start by asking the right questions, listening to understand and responding with empathy, warmth and compassion.

Ask patients if they have clarity

To begin the financial conversation, it's important to first make sure the patient understands what dentistry is being recommended and understands the benefits of care.

"Mrs. Jones, Dr. Smith has made some care recommendations. I know it's often a lot of information to absorb. What is your understanding of the treatment recommended for you?"

Ask patients if they are aware

Cost remains one of the primary barriers to care. The key is to never, ever make the patient ask about payment options. Instead, they should be introduced to them even before cost of care is discussed.

"Mrs. Jones, let's go over the investment of your care and what your dental benefits may contribute. But first, are you aware of all the payment options doctor has made available to our patients? Of course we accept cash and all major credit cards. We also provide payment plans through a third party financing company. You may have seen the information in our reception area.

Ask patients what's convenient

Once all questions and concerns about treatment and payment options are addressed, now you can help the patient schedule an appointment that doesn't stress their schedule. Giving them options and choices can overcome any concerns about fitting care into their busy schedule.

“Mrs. Jones, I’m glad I was able to address all your concerns. Let’s go ahead and find some time in your schedule that’s convenient for you.

Asking the right questions sets the foundation of a great financial conversation, turning it into a dialogue that enables the patient to be heard and the team to respond appropriately.