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Are you doing virtual consults?

Are you doing them well?

At TIO our members have been offering virtual consultations for many years, we have fine tuned the process to both support and enhance the patient journey for our specialist practices, their teams and ultimately their patients.

Use our checklist & top tips to ensure that your virtual consultations run smoothly and get you those all important new starts.



Virtual Consultation Checklist



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- ☐ **Know Your Why**
Whether it is responding to consumer demand, competitive pressure, increase in conversion rate, or growth, you have to know your why in order to determine how you will implement Virtual Consultations in your practice.
- ☐ **Know What You Are Implementing**
You can implement it as a lead capture tool on your website or as a way to qualify leads before you schedule any doctor time. You could also conduct actual virtual appointments using video meetings. Any combination of these can work but you have to know what you are implementing and why.
- ☐ **Be Clear**
Are you offering a smile assessment or a virtual consultation? Your patient will want to know what is in it for them. Information at the front end is key, surrounding; fee's (if applicable), photos (angles & quality), systems and technology (IQ).
- ☐ **'New' new Patient Journey**
Do you have a clear and concise 'New' new patient journey in place?
- ☐ **Tracking and Monitoring**
Do you know where your leads come from, where they are in their journey?
- ☐ **CRM**
Do you have a CRM system? Manual processes are timely and inefficient, never lose a patient through the cracks again.
- ☐ **Platform**
How will this be promoted on the website and how will you conduct the consultation? Zoom, Microsoft Teams, SmileSnap, Doxy.me, etc?
- ☐ **Own the Virtual Journey**
Get truly comfortable with how you communicate using the appropriate channels. Be authentic throughout each step of the customer buying journey.

TIO's Top 10 Tips to conduct a great consultation

- 1. Know your equipment** – Before you start the call ensure you have a good internet connection and you have a good understanding of the equipment you are using.
- 2. Avoid disturbances** – Be patient centric.
- 3. Check sound and video quality** – Ensure you have good lighting.
- 4. Always use active listening** – Set yourself apart with great rapport building.
- 5. Make eye contact** – This may not be possible if making notes so tell your patient if this is the case.
- 6. Pick up on cues** – Ask great open questions.
- 7. Offer opportunities to ask questions** – Summarize and repeat back regularly so your patient knows you are listening.
- 8. Advise on next steps** – Think about language, key stages, accessibility, specialist care.
- 9. Document well** – Build time into your day for documentation, evaluation and follow up.
- 10. Take regular breaks during the day** – You want each consultation to feel like "showtime".

If you want to find out more about how TIO can help accelerate your practice growth email casey@theinvisibleortho.com



"Virtual consults have doubled our conversion rates" — TIO Member

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The TIO 'New' NP Journey

We understand this TIO example may not be the same for every practice, however it will give you an idea of what the 'New' NP Journey will look like. Be sure to map yours with the involvement of the team to ensure it is both seamless and patient centric.

