

Course Outline

Revised 03.10.20

Treatment
Coordinator
Academy

Module 1: The TC Defined

- Birth of the Position
- Evolution of the TC
- The 5 Roles of a TC
- Characteristics of High-Performing TCs

Module 2: The New Patient Experience, Pt. I

- The Importance of First Impressions
- The 3-Step Setup
- Recipe for New Patient Call
- Why the Insurance Call is a Critical Differentiator
- The TC Call & Priming for Same-Day Starts

Module 3: The New Patient Experience, Pt. II

- The 3 Blocks of the New Patient "Show"
- Block #1 – The Warm-Up
- Block #2 – Doc Time
- Block #3 – TX Coordination

Module 4: Ortho Essentials

- Science Side of TC'ing
- Phases of Treatment
- Actual Cases

Module 5: Finesse & Impress

- Soft Skills & Building Rapport
- 5 Typical Patient Scenarios
- Child vs. Adult Exams
- The Future of Exams
- Emotions & Leadership

Module 6: The Secret to Same-Day Starts

- Benefits of Same-Day Starts
- The Secret to Executing Same-Day Starts
- Challenges to SDS
- Setting Expectations with Patients & Team
- The Key Strategy That Makes Them Possible

Module 7: Post-Consult Responsibilities

- Basic Charting Skills
- The Two Types of Correspondence
- Sales Communication Recommendations

Module 8: Pending Protocol

- Importance of an Effective Protocol
- Our "NEXT" Approach
- Customer Relationship Management
- Tools to Keep Things Straight

Module 9: Conversion Rate v. Closure Rate

- Conversion Rate Formula
- Challenges to Conversion Rate
- Closure Rate Formula
- How to Track Your Closure

Module 10: Marketing 101

- Basic Sales Funnel
- Three Pillars of Your Marketing Strategy
- Internal Marketing Ideas
- Social Media & Online Presence

Module 11: Observation & Recall Program

- Components of Successful Observation Protocol
- Recall Exams
- Strategies for Engagement

Module 12: Where Do You Go From Here?

- Quick Course Summary
- A Practice's Life Cycle
- Leadership & Development