



Missouri Dental
ASSOCIATION



***Mastering Case Presentation:
Getting to “Yes”!***

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• has no financial obligations to disclose •

Friday, June 26, 2026

1:30p to 4:30p

Mastering Case Presentation
Getting to "Yes"!

Presented by:
Dr. Roger P. Levin

Prepared for:

Levin Group
Increasing Practice Production
Through Proven Business Systems

MDA Missouri Dental Association

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To increase your practice income and reduce stress through the implementation of proven case presentation systems

Seminar Objective

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Did You Know...?

1. Every practice has a 30-50% growth potential
2. You can increase your revenue by \$15-\$20 million over the course of your career
3. You can reach financial independence 10 years earlier than the average dentist retirement age
4. You can increase income and profit every year
5. You can achieve a low-stress, high-production practice - It's being done now

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Just Imagine...

- Every patient is interested in optimal oral health
- Every patient has unlimited finances
- Every patient says YES

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Reality Check #1

- Every patient does not know all treatment options
- Every patient does not have unlimited finances
- Even if they understand, every qualified patient does not want optimal oral health

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Reality Check #2

- 81% of GP appointments are single tooth treatment
- Esthetic options are typically more involved
- Acceptance of larger recommended cases requires transformation

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Getting to “YES”...

Is All About Transforming You!

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Getting Patients to Say “Yes” is About Transforming Yourself and Your Presentation Skills

- Human nature has not changed
- Most patients don't want optimal oral health
- Most patients do want oral comfort, esthetics, ability to chew, avoidance of more complex and painful procedures, and permanent solutions
- Most patients think short-term

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The Transformation Checklist

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The Transformation Checklist

1. Build Powerful RELATIONSHIPS

- The foundation of all service selling.
- Anyone who builds powerful relationships will be successful in any service business.
- Make your patients your friends.
- Relationships are based on trust.

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The Transformation Checklist

2. Treat Every Patient With RESPECT

- Enthusiastic greeting.
- Be on time.
- Thank them for coming.
- Tell them you have been looking forward to the appointment. (If you have seen them before.)

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The Transformation Checklist

3. Third-Party PROOF

- Be endorsed
- The clinical team
- The front desk staff

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The Transformation Checklist

4. Be INTERESTED

- It is more important to be interested than interesting. ~John Gardner
- The Golden 10.
- Learn 1 new thing every visit.

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The Transformation Checklist

5. The LIKABILITY Factor

- Start with Dale Carnegie.
- Raise your enthusiasm.
- Bring a superior positive attitude every day - no matter what.

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The Transformation Checklist

6. Be An AUTHORITY

- How many esthetic cases have you done?
- What education have you acquired?
- What are your results?

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The Transformation Checklist

7. Tell a STORY

- Have stories prepared, similar to this patient.
- Demonstrate excellent results.
- Tell a story of a patient who did not follow through with treatment.
- Benefits-based case presentation.

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The Transformation Checklist

8. Ask QUESTIONS Along The Way

- Keep the patient engaged.
- Keep it short.
- Have a full conversation.
- Don't do more than 50% of the talking.

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The Transformation Checklist

9. Share Your CONFIDENCE

- Don't be shy about success rates.
- Give some data.
- Talk about your own results.

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The Transformation Checklist

10. Show **EMPATHY**

- "I understand how you **FEEL**."
- "Many patients have **FELT** the same way."
- "Others have **FOUND** that improved esthetics have ..."

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The Transformation Checklist

11. Use **WORDS** That Create Energy

- Power Words.
- Positive language.
- Superior positive attitude every day
- no matter what.
- Be enthusiastic

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The Transformation Checklist

12. Be **HUMAN**

- Give your cell phone number.
- Tell them how you will take care of them.
- Tell them that you care.

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And Then There's That Thing Known as... **MONEY**

- Don't diagnose wallets.
- It's not how much it costs.
- It's how **they** have to pay for it.

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The Transformation Checklist for Better Case Presentation

1. Build Powerful Relationships
2. Treat Every Patient with Respect
3. Third-Party Proof
4. Be Interested
5. The Likability Factor
6. Be An Authority

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The Transformation Checklist for Better Case Presentation

7. Tell a Story
8. Ask Questions Along The Way
9. Share Your Confidence
10. Show Empathy
11. Use Words that Create Energy
12. Be Human

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Getting To "YES"

- It starts with a desire to transform and improve.
- When you master the Transformation Checklist, you become the compelling story leading to YES.

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Body Language

The Often-Overlooked Key To Higher Case Acceptance

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Increasing Case Acceptance

- Body language is one slice of the entire case presentation
- But it is a slice that can make or break everything else you do
- In a more competitive world, you want to have every advantage for success



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Increasing Case Acceptance

- Body language is all about Yin and Yang
- The familiar Yin and Yang symbol depicts two ideas that are very much interrelated and connected. There is a part of Yin in Yang (the dot) and vice versa. The two forces interact and must be balanced. The forces are both opposite and dependent on each other.



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Increasing Case Acceptance

- Body language is all about Yin and Yang
- Body language balances the visual and verbal messaging



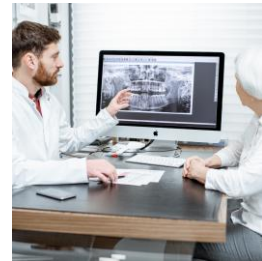
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Increasing Case Acceptance

You need the right location

- Chairside versus consult room
- Calm, quiet, relaxed (focused)
- Comfortable and set up for body language
- The wrong furniture can throw you off your game



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Increasing Case Acceptance

What does your body language say to a patient?

- "I care"
- "I don't care"
- "I believe what I am telling you is in your best interest"
- "I want to get as much out of you as I can"
- "I am really good at what I do"
- "I'm not sure if this will work or not, or if I am good enough"

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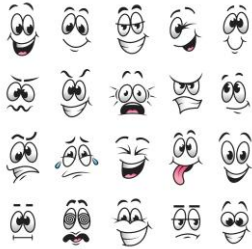
The Many Faces of Body Language



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The Many Faces of Body Language


- Put a face on each of your team members
- Put a face on yourself
- Have your team each put a face on themselves



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What is the most prominent type of communication?

- A. Verbal
- B. Non-verbal
- C. Auditory




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What is the most prominent type of communication?

- A. Verbal
- B. **Non-verbal**
- C. Auditory

80% of communication is non-verbal
(Maybe we should learn this in grade school)



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Increasing Case Acceptance

How do you want to be seen?

- Confident
- Focused
- Enthusiastic
- Energized
- Expert
- Caring
- Open
- Attentive
- Honest

Body language says a lot about all of these, and it happens in milliseconds


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Increasing Case Acceptance

You Can't Hide Your Body Language

- The patient gets a feeling
- They don't know why, but they form an immediate impression
- Now you live with the patient having that impression
- Masks won't hide your body language, the impression will still happen
- What you see is what you get
- What you see is what you **believe**

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13 Principles of Body Language

And what they mean for dentists and teams

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13 Principles of Body Language

1. Posture – confident or not
2. Head position – focused or not
3. Eye contact – interested in patient or not
4. Looking up or down - bored or not
5. Smile - caring or not
6. Arms and legs - open or closed person
7. Hands clasped, separate, steepled, tense, friendly or authoritative/dictatorial

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13 Principles of Body Language

8. Hands and arms movement - energized or boring
9. Eye level - above/superior, same/equal, below/subservient
10. Stand or seated - rushing or not
11. Full front or sideways - full attention or distracted
12. Leaning forward or slouching - energetic or not
13. Tone of voice - interesting or not

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Increasing Case Acceptance


- Body language is not an accident
- It expresses the inner you
- It will determine a significant percentage of your success in life



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Increasing Case Acceptance

- Body language is based on habit
- It can be changed
- It takes practice - one body part at a time
- People will react to you differently



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Increasing Case Acceptance

- Breaking old habits - making new ones
- Start with one position or component of body language
- Work on it for a week
- Add next position or component
- Lather, rinse, repeat!!

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Increasing Case Acceptance

1. Body language is more important than spoken language for case acceptance
2. Body language can contradict the spoken word
3. Location, physical positioning and tone of voice are all part of body language
4. There are 13 principles of body language for dentists to master
5. Breaking old habits will be essential to master body language

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The Treatment Presentation Appointment

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The Treatment Presentation Appointment

1. Thoroughly prepare for the presentation
 - Know the patient and family
 - Diagnosis and written plan
 - Review options for treatment and financing

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The Treatment Presentation Appointment

2. Give technical facts
 - Keep it short and simple
 - Explain dental health pre-conditions
 - Provide information about ideal options

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The Treatment Presentation Appointment

3. Treat every patient as #1 VIP
 - Individualize case plans to meet needs
 - Realize importance of relationship building
 - Promise excellent service

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The Treatment Presentation Appointment

4. Anticipate patient's concerns and questions

- What are the patient's key motivating factors?
- What are the issues behind the presented case?
- How can you be proactive to inspire the patient?



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The Treatment Presentation Appointment

5. Encourage reading of brochures or tablet

- Third-party proof
- Motivating
- Positive review of case presentation



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The Treatment Presentation Appointment

6. Train the team to promote treatment

- Set time to review and explain services to team
- Educate team members about patient motivation
- Determine strategies to educate patients

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The Treatment Presentation Appointment

7. Use scripts for role playing

- Design effective scripting for all routine conversations
- Include benefit statements
- Use key words and phrases like *"I'm delighted that..."*



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The Treatment Presentation Appointment

8. Educate front desk team

- Teach technical procedure benefits
- Encourage patient feedback
- Role play key conversations



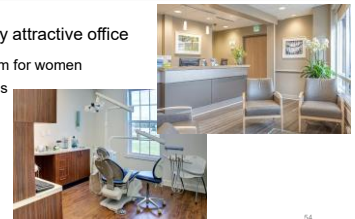
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The Treatment Presentation Appointment

9. Maintain esthetically attractive office

- Design reception room for women
- Modernize operatories
- Update periodically



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The Treatment Presentation Appointment

10. Promote good attitudes

- Start with strong and effective leadership
- Show support of teamwork
- Compliment successes



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The Treatment Presentation Appointment

11. Identify and discuss larger cases.

- Take time to seek larger cases
- Educate every patient about elective treatment
- Continue to plant seeds for future treatment



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The Treatment Presentation Appointment

12. Allot time to schedule larger cases.

- Allow units for significant cases
- Schedule appointments within 7 to 10 days
- Communicate in morning meetings



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The Treatment Presentation Appointment

13. Increase case presentation of elective procedures.

- Need-based treatment differs from elective services
- Emotional vs. logical decision-making
- Approach for presentation – focus on the benefits.



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The Treatment Presentation Appointment

14. Questions related to elective dentistry and the emotional decision.

- What are the benefits?
- Will this improve the quality of life?
- How will it improve the quality of life?
- Is it worth taking the time?
- Am I making a good decision?



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The Treatment Presentation Appointment

15. Motivating factors for accepting elective dentistry.

- Identify the "hot button" and address it
- Clinical or logical discussion and closure
- Key decision makers




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The Treatment Presentation Appointment

16. Dress professionally.

- Determine dress code
- Look neat and clean
- Pull it all together to create your image




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The Treatment Presentation Appointment

17. Train Financial Coordinator.

- Educate about financial plans
- Determine techniques and scripts
- Build in accountabilities



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The Treatment Presentation Appointment

18. Present four financial options.

- Develop four financial options
- Discuss benefits and disadvantages
- Offer financing




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The Treatment Presentation Appointment

19. Track case acceptance rates.

- Average production per patient
- Average production per new patient



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The Treatment Presentation Appointment

20. Follow-up with patients that fail to schedule.

- Follow-up next morning
- Determine procedure and system
- One-to-one marketing

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GP
Tip of the Day

How powerful are your conversations?

One of the most important factors in building great relationships with patients and increasing case acceptance is the ability to have great conversations.

The key to great conversations is taking an interest in the patient, learning one new thing about every patient every time they come in, listening intently and letting them know you care.

Practices that can achieve these objectives will increase practice production every year.

www.levingroup.com/tip

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**Mastering
Case Presentation**

Getting to "Yes"!



Thank you

 Dr. Roger P. Levin

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