DOMA

DENTAL OFFICE MANAGERS ALLIANCE

The Patient Conversation Guide

10 questions to ask before presenting treatment • Space to capture what matters.

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1 UNDERSTAND THEIR VISIT

What brought you in today?

PATIENT NOTES

2 EXPLORE PERSPECTIVE

How have you been feeling about your dental health?

PATIENT NOTES

3 IDENTIFY CONCERNS

What is worrying you most?

PATIENT NOTES

4 DEFINE SUCCESS

What would a great outcome look like for you?

PATIENT NOTES

5 DISCOVER MOTIVATION

Why is addressing this important now?

PATIENT NOTES

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10 questions to ask before presenting treatment • Space to capture what matters.

6 CHECK UNDERSTANDING

What questions do you have about the treatment recommendation?

PATIENT NOTES

7 EXPLORE BARRIERS

What might make moving forward difficult?

PATIENT NOTES

8 CLARIFY PRIORITIES

Which part of the treatment process matters most to you?

PATIENT NOTES

9 OFFER INFORMATION

What would help you feel comfortable making a decision?

PATIENT NOTES

10 AGREE ON NEXT STEPS

What would be a helpful next step for you?

PATIENT NOTES

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When Patients Hesitate

Clarify the real concern, then respond with information or options that fit.

PATIENT SAYS	ASK ONE MORE QUESTION
Will it hurt?	What part of the procedure worries you most?
That's too expensive.	Is it the total cost, or fitting payments into your budget?
Will insurance cover it?	Is understanding your coverage your biggest question?
How long will it take?	Are you concerned about appointment time, recovery, or scheduling?
I need to ask my spouse.	What information would help you both review the decision?
I need to think about it.	Is there a particular part you'd like us to clarify?

LISTEN → CLARIFY → RESPOND → AGREE

TEAM HUDDLE / FOLLOW-UP NOTES

What did we learn about the patient's actual concern? What information or next step did we agree on?

Listen more than you talk. Be curious, not assumptive. Respect the patient's decision.