

# Customer Service for Dental and Orthodontic Teams

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A team training guide for calm communication, patient comfort, service recovery, privacy, and trust-building.



**CALM**

Lower stress



**CLEAR**

Explain next steps



**KIND**

Build trust

White-label training manual • Customize with your office details



# How to Use This Guide

This white-label guide is designed as a practical training manual. Use it as a learner workbook, onboarding companion, office training reference, or digital product base. Customize it with your office policies, software screenshots, trainer initials, and state-specific requirements before using it as an internal manual.

## Read

Move through one section at a time instead of trying to memorize everything at once.

## Practice

Use the scripts, drills, and checklists until the workflow feels natural.

## Customize

Add office-specific details, provider direction, and local rules before final use.

### SCOPE + SAFETY NOTE

This guide is educational. Follow your office policies, supervising provider direction, state rules, OSHA/CDC guidance, HIPAA privacy requirements, and manufacturer instructions.

## Training Goal

The goal is not to make a new team member sound like an expert on day one. The goal is to help them become organized, safe, coachable, clear, and useful in the role.



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### How to Use This Guide

This is not just a manners guide. It is a daily service system for real dental and orthodontic offices. Customer service in a dental or orthodontic office means helping patients feel informed, respected, safe, and welcomed from the first call to the final goodbye. It also means helping the team move smoother because everybody knows how to communicate.

### The This guide Lens

The goal is not to sound fake or overly perfect. The goal is to be calm, clear, warm, and useful. Patients remember how the office made them feel when they were nervous, confused, embarrassed, rushed, or unsure. Use this guide three ways:

- For new hires: read one section per day and practice the scripts out loud.
- For trainers: use the trainer checklists and scenario drills during onboarding.
- For teams: choose one service standard each week and build it into daily huddle.

The best team members do not just complete tasks. They lower patient stress while completing tasks.

### Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### What Service Really Means Here



Dental and orthodontic service is healthcare support plus human care. Patients may walk in with fear, pain, money concerns, embarrassment about their teeth, confusion about insurance, worry about their child, or anxiety about treatment. A great team does not ignore those emotions. A great team creates structure around them. Good service looks like

- Greeting patients before they have to search for help.
- Explaining what happens next in simple language.
- Respecting privacy at the desk, in the hall, and online.
- Owning follow-up instead of saying, "I do not know."
- Keeping tone calm when the patient is frustrated. Poor service looks like
- Letting patients stand confused at check-in.
- Using office slang without explaining it.
- Talking about patient details where others can hear.
- Blaming another department instead of creating a handoff.
- Matching a patient's frustration with attitude.

## Office Reality Check

A patient can receive excellent clinical care and still leave feeling disappointed if the communication was cold, rushed, or confusing. Service is the bridge between treatment and trust.

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## The Four Service Standards

Every team member should be able to remember these four words: calm, clear, kind, consistent.

### Standard

#### What it means

#### Daily example

##### Calm

Your tone helps regulate the moment. "Let me help you with that. We will take this one step at a time."

##### Clear

You explain the next step without overloading the patient. "First we will check you in. Then the assistant will bring you back."

##### Kind

You treat people with dignity, even when they are stressed. "Thank you for your patience. I know schedule changes can be frustrating."

##### Consistent

The patient gets the same reliable experience across the team. Everyone uses the same handoff, payment, and appointment language. Consistency beats personality. A friendly person can have a bad day, but a good service system protects the patient experience every day.

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#### Trainer Check

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## The Patient Journey Map

Service is not one moment. It is every touchpoint. The patient experience begins before the patient enters the building and continues after they leave. A team that understands the journey can spot where trust is built or broken.

### Stage

Patient may be thinking

### Team service goal

#### First call

Can they help me? Will this be expensive? Sound welcoming, collect the right info, and give a clear next step.

#### Arrival

Where do I go? Am I late? Greet quickly, confirm identity, and reduce confusion.

#### Clinical flow

What are they doing? Is this normal? Explain what is happening before touching instruments or appliances.

#### Doctor/TC handoff

What did the doctor say? What do I do now? Summarize clearly and confirm the next action.

#### Financial/insurance

Can I afford this? What does insurance cover? Stay respectful, private, and solution-focused.

#### Checkout

#### When do I come back? What should I

remember? Confirm instructions, schedule next step, and close warmly.

### Trainer Prompt

Ask a new hire to walk through the office as if they are a first-time patient. Where would they feel welcomed? Where would they feel lost?

### Field Drill



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## First Impressions Start Before Hello

Patients notice the room, the desk, the tone, and the team rhythm. A clean, calm, prepared environment sends the message: "You are in the right place." A cluttered desk, rushed tone, and unclear check-in process send the opposite message.

## Done

## Standard

☐ Front desk is visually clean enough for patient-facing work. ☐ Team members look up and acknowledge patients quickly. ☐ Private conversations are kept quiet and away from public areas. ☐ Phones are answered with a consistent greeting. ☐ Clinical areas look reset before patients enter. ☐ Patients are told what to expect if there is a delay.

## Trainer Note

The first impression is not about being fancy. It is about making the patient feel like the office is ready for them.

## Field Drill

## Trainer Check

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## Front Desk Service Standards



The front desk sets the emotional temperature of the office. Front desk team members often meet the patient first, hear frustration first, and close the visit last. Their service should be warm, organized, and firm without sounding cold.

## Use this language

- "Good morning, welcome in."
- "Let me confirm a few details for you."
- "I can help you with the next step."
- "Let me connect with the clinical team so I give you the right answer."
- "Thank you for waiting. Here is where we are."

## Avoid this language

- "I do not know."
- "That is not my department."
- "You should have called earlier."
- "We are busy."
- "I already told you."

Replace dead-end language with next-step language.

## Field Drill

### Trainer Check

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## Phone Tone and Ownership

The person on the phone cannot see your smile, your effort, or your intention. They hear your tone. A professional phone call has four parts: greeting, listening, confirming, and closing. New hires should practice the rhythm before trying to solve every situation.

## Call step





## What to say

### Purpose

### Greeting

*"Thank you for calling [Office Name], this is [Name]. How may*

### I help you?"

Creates a professional start.

### Listening

*"I hear you. Let me make sure I understand." Slows the moment and shows attention.*

### Confirming

*"So you are calling about [reason], and you need [next step]." Prevents mistakes.*

### Closing

*"You are all set for [date/time]. Please call us if anything changes." Leaves the patient clear.*

### Ownership Phrase

*"Let me find the best next step" sounds stronger than "I do not know." It keeps the patient from feeling dropped.*

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### Chairside Service Standards

Chairside service is where technical work and patient comfort meet. A chairside assistant can create trust by explaining before acting, checking comfort, staying organized, and keeping the patient informed without



over-talking.

## Done

### Standard

□ Greet the patient by name when appropriate. □ Explain what you are about to do in beginner-friendly language. □ Ask comfort questions before the patient becomes overwhelmed. □ Keep instruments organized and avoid chaotic movement around the patient. □ Give clear next-step language after the appointment. □ Use teach-back when giving home-care or appliance instructions.

### Simple Chairside Script

*"Today we are going to get you set up, check your comfort, and make sure you know what to do when you leave. If anything feels sharp, tight, or confusing, let us know."*

## Field Drill

### Trainer Check

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### Records and Sterilization Still Serve Patients

Even behind-the-scenes roles shape the patient experience. Patients may not see every sterilization step, chart prep detail, or records upload. But they feel the result when appointments run smoothly and rooms look ready.

### Records service habits

- Prepare the patient before photos, scans, or X-rays.
- Use respectful language when positioning the patient.
- Avoid frustration if a photo or scan needs repeating.



- Label and upload records correctly so the team does not search later.

## Sterilization service habits

- Protect clean and dirty zones.
- Keep instruments moving so rooms do not back up.
- Speak up if something looks questionable.
- Remember that infection control is patient care. The patient may never know who kept the flow moving, but the whole office feels it when that person is excellent.

## Field Drill

### Trainer Check

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### Treatment Coordinator Service

A great consultation feels organized, not salesy. Treatment coordinators and their assistants often help patients understand care, cost, timing, and next steps. The service goal is to make information feel manageable.

### Moment

#### Service focus

#### Helpful phrase

#### Before consult

Prepare the patient for the visit flow. "We will take records, meet with the doctor, and then talk through options."



## After doctor exam

Translate the next step clearly. "Here is what the doctor recommended and what it means for today."

## Financial talk

Keep privacy and respect high. "We can review options that fit your family's needs."

## Follow-up

Keep the door open. "I will follow up with you on [day] so you do not have to start over."

## Trainer Note

Patients do not want to feel pushed. They want to feel guided. Confidence plus patience wins more trust than pressure.

## Field Drill

## Trainer Check

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## Financial and Insurance Conversations

Money conversations require privacy, clarity, and dignity. Financial and insurance questions are emotional because patients are trying to understand cost, coverage, and commitment. The team should be careful not to shame, rush, or guess.

## Say this

- "Let me review the details before I answer."
- "Insurance estimates can change, but here is what we have verified."
- "We can talk through payment options privately."
- "I want to make sure this is explained clearly."



## Avoid this

- "Your insurance does not pay for anything."
- "You have to pay this today or else."
- "That is expensive."
- "I am pretty sure it will cover it."

## Privacy Reminder

Discuss money, insurance, health history, and treatment concerns in the most private practical way. Keep voices low, screens protected, and details limited to the people who need to know.

## Field Drill

### Trainer Check

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## Different Patients Need Different Service

Children, teens, adults, and parents all listen differently.

### Patient type

What they may need

### Service approach

#### Child

Safety, friendliness, simple explanation. Use short phrases, calm tone, and praise cooperation.

#### Teen

Respect, independence, no embarrassment. Speak to them directly while including the parent when needed.

#### Parent



Clarity, timeline, cost, home-care instructions. Summarize next steps and confirm understanding.

## Adult patient

Efficiency, privacy, confidence. Respect their time and explain choices without talking down.

## Nervous patient

Control, reassurance, slower pacing. Tell them what will happen before it happens and offer pauses when appropriate. Personalized service does not mean changing the standard. It means choosing the right words for the person in front of you.

## Field Drill

### Trainer Check

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## Serving Nervous Patients

Dental fear is real. The team should not dismiss it. A nervous patient may ask repeated questions, seem quiet, cancel often, tense up in the chair, or apologize for being anxious. The team can lower stress by creating predictability.

## Done

### Standard

- ☐ Acknowledge the concern without making it dramatic. ☐ Explain the appointment in small steps. ☐ Ask if they need a pause before continuing when appropriate. ☐ Avoid jokes about pain, needles, braces, or fear.
- ☐ Praise cooperation honestly and respectfully. ☐ Document important comfort notes according to office policy.

### Comfort Script

*"A lot of people feel nervous at first. We will walk you through each step, and if you need us to pause or explain something, please let us know."*



## Field Drill

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### Teach-Back: Confirm Understanding

Teach-back helps the team know whether instructions were explained clearly. Teach-back is not a test for the patient. It is a check on how clearly the team explained the information. The goal is to have the patient or caregiver repeat the key action in their own words.

### Instruction type

#### Teach-back prompt

#### Elastics

*"Just so I know I explained it clearly, can you show me how you will wear your elastics?"*

#### Retainer care

*"Can you tell me where the retainer should be when it is not in your mouth?"*

#### Home care

*"Can you walk me through what you will do tonight after brushing?"*

#### Next appointment

*"Can you repeat the date and what this next visit is for?"*

### Why It Matters

AHRQ describes teach-back as a patient engagement and safety tool that helps confirm information was explained clearly. In the office, it can prevent confusion after the patient leaves.

## Field Drill



## Trainer Check

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## The Warm Handoff Formula

A handoff should make the patient feel carried, not passed around. A warm handoff connects the patient, the next team member, and the reason for the handoff. It prevents the patient from repeating the same story and prevents the team from missing details.

### Step

### What to include

### Example

#### Name

Introduce the next person. "Ms. Taylor, this is Jasmine. She will help with your next appointment."

#### Reason

Explain why the handoff is happening. "We finished the adjustment and now need to schedule your next wire check."

#### Need

Share the key detail. "She mentioned mornings work best and Fridays are hard."

#### Close

Confirm the patient is in good hands. "Jasmine will take it from here and get you set up." A good handoff protects the patient experience and the team workflow at the same time.

## Field Drill

## Trainer Check





Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### **Privacy and Respect**

Customer service in healthcare includes protecting patient information. Privacy is not only a policy. It is part of service. Patients should not hear other patients' details at the desk, see another chart on a screen, or feel exposed during financial or treatment conversations.

### **Done**

### **Standard**

□ Use the minimum information needed for the task. □ Lower your voice when discussing health, insurance, money, or treatment details. □ Do not discuss patient details in public areas or casual conversations. □ Position screens and paperwork to reduce unnecessary visibility. □ Verify identity before discussing appointment or account details according to office policy. □ Ask a supervisor before sharing information you are unsure about.

### **Service Standard**

Respectful offices do not make patients feel like their private life is being broadcast.

### **Field Drill**

### **Trainer Check**

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### **Safety Creates Trust**

Patients trust offices that look clean, organized, and careful. Safety habits are part of the patient experience. A patient may not understand every infection-prevention step, but they notice whether the office looks clean, whether gloves are changed, and whether the team handles instruments with care.



## Visible trust builders

- Clean rooms before seating the patient.
- Fresh gloves and proper PPE habits.
- Clear separation of clean and dirty items.
- Calm sharps and instrument handling.

## Trust breakers

- Cluttered counters with unknown items.
- Touching clean and dirty surfaces without awareness.
- Rushed room turnover that looks sloppy.
- Talking casually about safety shortcuts.

## CDC Connection

CDC dental Standard Precautions include hand hygiene, PPE, sharps safety, sterile instruments and devices, and clean/disinfected environmental surfaces. Service and safety work together.

## Field Drill

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## Service Recovery Ladder

When something goes wrong, the team needs a calm path back to trust. Service recovery is what the team does after delay, confusion, discomfort, miscommunication, or frustration. The goal is not to argue about who is right. The goal is to listen, clarify, and move toward the next useful step.

## Step

## Action



## Phrase

- Pause

Do not interrupt or match the patient's tone. "I want to understand what happened."

- Acknowledge

Name the frustration without blame. "I can understand why that would be frustrating."

- Clarify

Ask one useful question. "Can you tell me what you were expecting today?"

- Own next step

Do what you can or find who can. "Let me check with the coordinator so we can answer correctly."

- Close loop

Summarize what will happen next. "Here is the plan from here." Service recovery is not weakness. It is professionalism under pressure.

## Field Drill

### Trainer Check

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## De-escalation Language

A calm script helps when emotions are high. When a patient is upset, the team should lower volume, slow the pace, and avoid defensive language. The right words help create enough calm to solve the problem.

### Situation

### Instead of

### Say

### Patient is angry

*"Calm down." "I can hear this is frustrating. Let me help with the next step."*



## Patient interrupts

*"Let me finish." "I want to make sure I answer fully. May I explain what I found?"*

## You need help

*"I cannot do that." "I want to get the right person involved so we handle this correctly."*

## Policy issue

*"That is our policy." "Here is what the office process allows, and here is what we can do next."*

## Do Not Take the Bait

If the patient's tone rises, keep your tone steady. You can be firm without being sharp.

## Field Drill

### Trainer Check

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## Late Arrivals, Cancellations, and No-Shows

Firm can still be kind. Schedule conversations can become emotional because patients may feel judged, rushed, or inconvenienced. The team should protect the schedule while keeping the patient respected.

### Late arrival script

- "I am glad you made it in. Let me check what we can still complete today."
- "Because the appointment time is shortened, we may need to adjust the visit plan."
- "I will confirm with the clinical team before promising anything."

### Cancellation/no-show script



- "Thank you for letting us know. Let's find the next best opening."
- "We want to keep treatment moving, so I will look for the earliest appropriate appointment."
- "Please call as soon as you know there is a conflict."

## Service Goal

Protect the doctor's schedule, the clinical flow, and the patient relationship at the same time.

## Field Drill

## Trainer Check

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## Repair and Discomfort Calls

The team should gather facts without diagnosing beyond role or scope. Patients may call about poking wires, broken brackets, lost retainers, discomfort, aligner fit, or appliance concerns. The service job is to listen, gather basic information, avoid unsafe promises, and route appropriately.

## Ask

## Why it helps

*"What are you noticing right now?" Lets the patient describe the concern. "When did it start?" Helps the team understand urgency and timing. "Is anything sharp, loose, or causing irritation?" Helps route to the correct team member. "Can you send a photo if the office allows that?" May help the clinical team review before scheduling. "Let me check with the clinical team." Avoids guessing or overpromising.*

## Boundary Script



*"I do not want to guess from the front desk. Let me get this to the clinical team so we can guide you correctly."*

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### Complaints and Concerns

Complaints are information. Handle them with structure. Every office will receive concerns about wait time, fees, discomfort, scheduling, communication, or expectations. A complaint handled well can become a trust-building moment.

### Done

### Standard

☐ Listen without debating the patient's feelings. ☐ Write down the concern accurately according to office process. ☐ Avoid blaming another team member or department. ☐ Clarify what the patient is asking for now. ☐ Escalate to the right lead, office manager, doctor, or coordinator when needed. ☐ Close the loop after the next step is decided.

### Complaint Script

*"Thank you for telling us. I want to make sure I understand this correctly and get it to the right person. What would help resolve this from your perspective?"*

## Field Drill

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## Team Communication Behind the Scenes

Patients feel the quality of team communication even when they do not hear it. Customer service breaks down when the team has poor internal communication. A patient should not experience confusion because departments did not talk to each other.

### Team moment

#### Better habit

Front desk to clinical Share arrival notes, late status, repair concern, and patient anxiety notes appropriately.

#### Clinical to checkout

Tell checkout what was completed, what is next, and any scheduling instructions.

#### Clinical to TC

Share doctor recommendation, patient questions, and readiness concerns. Financial to front desk Share only what is needed for scheduling or collection workflow. Office manager to team Clarify service standards, escalations, and script expectations. The patient should never feel like the team is making them carry the message.

### Field Drill

#### Trainer Check

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### The Daily Huddle Service Check

Five minutes can prevent five hours of confusion. A service-focused huddle helps the team prepare for patients who may need extra support, schedule spots that may get tight, and communication moments that need a clear plan.



## Done

## Standard

☐ Which patients are new today? ☐ Which patients may be nervous, young, late, or difficult to schedule? ☐ Which appointments need a TC, financial, or insurance handoff? ☐ Which patients need special communication notes reviewed? ☐ Where could the schedule bottleneck? ☐ What is today's service focus word: calm, clear, kind, or consistent?

## Huddle Phrase

*"Today, our service focus is clear handoffs. Nobody leaves a room without knowing what happens next."*

## Field Drill

## Trainer Check

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## Digital Service: Text, Email, and Voicemail

Written communication should be clear, short, professional, and privacy-aware. Digital messages can help patients, but they can also create confusion if they are too vague, too casual, or contain more private information than needed. Follow office policy and approved communication tools.

## Channel

## Best use

## Service rule

## Text

Confirmations, simple reminders, approved links. Keep it short and avoid sensitive details unless policy allows.

## Email





Forms, general follow-up, approved written info. Use clear subject lines and correct patient identity.

## Voicemail

Callback requests and basic appointment follow-up. Leave limited information according to office policy.

## Portal/app

Secure communication when available. Direct patients to the approved route for sensitive details.

## Voicemail Template

*"Hi, this is [Name] calling from [Office Name]. Please call us back at [number] when you have a moment. Thank you."*

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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## Reviews and Referrals

Great service creates moments patients want to share. Reviews and referrals usually come from a feeling: the patient felt cared for, heard, respected, and confident. The team should never pressure patients, but they can make it easy to share a positive experience when appropriate.

## Trust builders

- Remembering patient preferences.
- Explaining costs and next steps clearly.
- Reducing fear during appointments.
- Handling mistakes with honesty.
- Following through when promised.

## Soft review ask

- "We are so glad you had a good visit."



- "If you feel comfortable sharing your experience, reviews help other families find us."
- "No pressure at all - we just appreciate you being here."

## Office Reality Check

A review request lands better after a real service moment, not after a rushed or confusing visit.

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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## What Not to Say

Words can either close trust or open the next step.

## Instead of saying

### Say this

*"I do not know." "Let me find out so I give you the right information." "That is not my job." "Let me connect you with the team member who handles that." "We are short staffed." "Thank you for your patience. We are working to get you taken care of." "You missed your appointment." "It looks like we need to reschedule and keep treatment moving." "Your child is not cooperating." "We had a little trouble getting through everything today, so here is the plan for next time." "Insurance is confusing." "Insurance estimates can be detailed. Let me walk through what we have verified." Professional language should not hide the truth. It should deliver the truth with respect and clarity.*

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one



approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Script Library: Greetings and Openings

Use these until your natural voice becomes professional and consistent. New hires should not be expected to invent great language under pressure. Start with scripts. Then personalize once the standard is understood.

#### Moment

#### Script

##### Walk-in greeting

*"Good morning, welcome in. What name is the appointment under?"*

##### First-time patient

*"We are glad you are here. I will help you get checked in and explain the next step."*

##### Running behind

*"Thank you for your patience. We are running a little behind, and I will keep you updated."*

##### Patient seems lost

*"Hi, I can help point you in the right direction."*

##### Child patient

*"Hi [Name], we are going to take good care of you today."*

#### Practice Drill

Read each script out loud three times: friendly, calm, and firm. Notice how the same words can sound different based on tone.

#### Field Drill

#### Trainer Check



Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### **Script Library: Chairside and Instructions**

Clear instructions help patients succeed at home.

#### **Moment**

#### **Script**

##### **Before procedure**

*"I am going to explain what we are doing before we start."*

##### **Checking comfort**

*"How are you doing? Anything sharp or uncomfortable right now?"*

##### **Elastic instruction**

*"I am going to show you, then I want you to show me back so I know I explained it clearly."*

##### **Retainer reminder**

*"When it is not in your mouth, it should be in the case."*

##### **End of visit**

*"Before you go, let me review what we did today and what to watch for."*

#### **Trainer Note**

Patients do better with simple repeatable instructions than long lectures. Less confusion means fewer calls and better compliance.

#### **Field Drill**

#### **Trainer Check**



Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Script Library: Boundaries and Scope

Service does not mean guessing or overstepping. Great service includes knowing when to pause and route the question. New hires especially need safe language for questions outside their role, training, or state scope.

#### Question type

#### Safe response

#### Clinical diagnosis

*"I want the doctor or clinical lead to answer that accurately."*

#### Treatment change

*"Let me confirm with the doctor before we make any changes."*

#### Insurance guarantee

*"Insurance estimates can change, so let me review what has been verified." Pain or emergency concern*  
*"Let me get this to the clinical team right away so we can guide you correctly."*

#### State-specific duty

*"I will follow our office process and state requirements for that duty." Never guess to sound helpful.*  
*Correct routing is better service than confident wrong information.*

### Field Drill

#### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.



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### Script Library: Upset Patient Moments

Use calm words that move the conversation forward.

#### Moment

#### Script

##### Patient feels ignored

*"I am sorry this felt unclear. Let me help make the next step clear now."*

##### Long wait

*"Thank you for waiting. I know your time matters. Here is the update I have."*

##### Billing frustration

*"I understand this is stressful. Let us review it privately and carefully."*

##### Treatment confusion

*"Let me slow down and walk through what happened today."*

##### Wants manager/doctor

*"I can help get the right person involved. Let me share what I understand so far."*

#### Tone Rule

The calmer your tone, the easier it is for the patient to come down. The sharper your tone, the more the patient will defend their frustration.

#### Field Drill

#### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.



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### Service Scenario Drills

Practice before the real moment happens. Role-play helps new hires build confidence without using real patients as practice. Trainers can run one scenario per day for two weeks.

#### Scenario

##### New hire goal

##### Trainer checks

Parent upset about wait time Acknowledge, update, and close loop. Tone stayed calm; next step was clear. Teen embarrassed about broken bracket Avoid shame; gather info; route correctly. Language stayed respectful. Adult patient asks for cost quickly Protect privacy; offer review; avoid guessing. Did not overpromise insurance or fees. Nervous child at records Explain simply and praise cooperation. Used age-appropriate language. No-show patient calls back Reschedule professionally and keep treatment moving. Firm but kind.

##### Trainer Tip

After each drill, ask: What did you do well? What would you say differently? What was the next step?

##### Field Drill

##### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Customer Service Scorecard

Measure the behavior, not just the feeling. Customer service can be trained when standards are observable. Use this scorecard weekly during onboarding or during team refreshers.

#### Skill



1 - Needs practice

### **3 - Consistent**

### **5 - Excellent**

#### **Greeting**

Often misses or sounds rushed. Greets clearly and promptly. Creates immediate warmth and direction.

#### **Listening**

Interrupts or assumes. Confirms key details. Makes patient feel fully heard.

#### **Handoff**

Leaves gaps or confusion. Shares needed details. Smooth, warm, and complete.

#### **Privacy**

Needs reminders. Protects details consistently. Models privacy for others.

#### **Recovery**

Gets defensive. Uses calm next-step language. Turns tension into trust.

#### **Use It Well**

A scorecard should coach, not shame. Pair every low score with one practice action.

#### **Field Drill**

#### **Trainer Check**

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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#### **First 7 Days Practice Plan**

A new hire should hear, see, practice, and then perform.





## Day

## Focus

## Practice task

### Day 1

Observe service flow. Write down three phrases the team uses well.

### Day 2

Greetings and phone tone. Practice the office greeting and closing script.

### Day 3

Patient journey. Follow one patient handoff from arrival to checkout.

### Day 4

Privacy and professionalism. Identify where patient details must be protected.

### Day 5

Upset patient language. Role-play one de-escalation scenario.

### Day 6

Teach-back and instructions. Practice explaining one common instruction simply.

### Day 7

Feedback review. Ask trainer: What service habit should I focus on next week? The first week is not about being perfect. It is about building the right voice, rhythm, and awareness.

## Field Drill

## Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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## 30-Day Service Growth Plan

Customer service should grow from observation to ownership.

### Week

#### Growth target

#### Trainer action

#### Week 1

Observe and repeat approved language. Model greetings, calls, handoffs, and privacy habits.

#### Week 2

Handle simple patient moments with supervision. Let new hire greet, confirm, and close basic interactions.

#### Week 3

Practice recovery and handoff language. Run role-play drills and review real examples.

#### Week 4

Own common service moments confidently. Score readiness and identify next growth lane.

### Growth Question

At the end of 30 days ask: Do patients feel clearer after interacting with this team member? If yes, they are growing in the right direction.

### Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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## Trainer Sign-Off Ladder

Sign off on behavior that can be repeated, not just watched once.

### Done

### Standard

□ New hire greets patients with consistent tone and eye contact when appropriate. □ New hire answers or routes basic questions without guessing. □ New hire uses warm handoffs to front desk, clinical, TC, or financial team. □ New hire respects privacy and avoids public discussion of patient details. □ New hire can use teach-back for simple instructions. □ New hire can handle mild frustration with calm next-step language. □ New hire asks for help before overstepping scope or policy. □ New hire can explain the patient journey in their own words.

### Trainer Note

Do not sign off just because someone is nice. Sign off when their service behavior is reliable under normal office pressure.

### Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Team Standards Poster

Print this page or turn it into a team huddle reminder.

### Our Service Promise

We welcome quickly. We explain clearly. We protect privacy. We use calm words. We create warm handoffs. We do not guess outside our role. We recover mistakes professionally. We make patients feel cared for, not carried along. Every patient should leave knowing

- What happened today.
- What happens next.



- Who to contact with questions.
- What they are responsible for at home.
- That the team cared enough to explain.

Every team member should practice

- Looking up and acknowledging people.
- Using next-step language.
- Protecting privacy.
- Closing loops.
- Asking for help before guessing.

Calm. Clear. Kind. Consistent.

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Final Readiness Checklist

A team member is service-ready when they can perform these habits consistently.

## Done

### Standard

☐ I can explain what customer service means in a dental or orthodontic office. ☐ I can greet patients and help them know what happens next. ☐ I can use calm language when a patient is nervous or upset. ☐ I can protect patient privacy in daily conversations. ☐ I can make a warm handoff without dropping important details. ☐ I can avoid guessing and route questions to the right person. ☐ I can use teach-back for simple home-care or appliance instructions. ☐ I can recover from mistakes with honesty and professionalism. ☐ I can receive feedback without taking it personally. ☐ I can help patients feel respected even when the office is busy.

## Ready Means Trusted



The goal is not to be the loudest or most polished person in the office. The goal is to become trusted by patients and teammates.

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### This guide Service Mindset

This is the heart of the guide. Customer service is not fake sweetness. It is the discipline of making people feel safe, respected, informed, and guided while the office does real work. Some patients will be easy. Some will be nervous. Some will be frustrated. Some will not understand the process yet. The team member who can stay calm, clear, kind, and consistent becomes valuable fast. Be the person who makes the office feel easier to trust. That is what This guide is teaching: not just how to get hired, but how to become the kind of team member people want to keep, train, promote, and trust with patients.

### Final Mentor Note

Skills matter. Systems matter. But in a patient-facing office, your presence matters too. A calm prepared team member can change the whole feel of a visit.

## Field Drill

### Trainer Check

Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Quick Reference: Service Language

Keep these short phrases close during training.



## Need

## Phrase

## Clarify

*"Let me make sure I understand."*

## Pause

*"Let me check before I answer."*

## Route

*"I want to get the right team member involved."*

## Acknowledge

*"I can understand why that would be frustrating."*

## Own next step

*"Here is what I can do next."*

## Protect privacy

*"Let us review that privately."*

## Teach-back

*"Can you show me how you will do that at home?"*

## Close loop

*"You are all set. Your next step is [next step]."*

## Practice Rule

Do not wait for a difficult patient to practice. Practice calm service language when the office is quiet so it is ready when the office is busy.

## Field Drill

## Trainer Check



Role-play this section for 2 minutes. One person plays the patient, one person plays the team member, and one person listens for calm, clear, kind, consistent language. Sign off when the new hire can use one approved phrase, identify the next step, and ask for help before guessing or overstepping.

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### Source Notes and Educational Disclaimer

This This guide guide is educational and training-focused. It does not replace office policy, state scope-of-practice rules, HIPAA/privacy training, OSHA training, infection-control training, or supervision by licensed clinical leaders. Source anchors used to support the guide:

- U.S. Bureau of Labor Statistics, Dental Assistants Occupational Outlook Handbook - duties, job outlook, and patient support context. <https://www.bls.gov/ooh/healthcare/dental-assistants.htm>
- American Association of Orthodontists, Orthodontic Staff Career - orthodontic office roles such as appointment coordinator and office manager. <https://aaainfo.org/orthodontic-staff-career/>
- CDC Dental Infection Prevention - Standard Precautions including hand hygiene, PPE, sharps safety, sterile instruments, and clean/disinfected surfaces. <https://www.cdc.gov/dental-infection-control/hcp/summary/standard-precautions.html>
- OSHA Dentistry - overview of dental workplace hazards including bloodborne pathogens, chemicals, human factors, ergonomics, noise, vibration, and workplace violence. <https://www.osha.gov/dentistry>
- HHS HIPAA Minimum Necessary Requirement - guidance to limit protected health information use or disclosure to what is needed for a purpose. <https://www.hhs.gov/hipaa/for-professionals/privacy/guidance/minimum-necessary-requirement/>
- AHRQ TeamSTEPPS Teach-Back - evidence-based patient communication method for checking understanding. <https://www.ahrq.gov/teamstepps-program/curriculum/communication/tools/teachback.html>
- DANB State Dental Assisting Requirements - state-by-state job titles, allowable duties, exams, and education pathways. <https://www.danb.org/state-requirements>
- American Dental Association, Sample Dental Assistant Job Description - dental assistant duties and interpersonal communication expectations; content and expanded functions may vary by state dental practice acts.



<https://www.ada.org/-/media/project/ada-organization/ada/ada-org/files/publications/guidelines-for-practice-success/gps-dental-team/dental-assistant.pdf>

## Scope Reminder

When in doubt, follow the office training manual, dentist or orthodontist direction, state rules, and the most current OSHA, CDC, HIPAA, and licensing guidance that applies to your workplace.





# White-Label Customization Checklist

Before selling, distributing, or using this guide inside an office, personalize it so the training feels like it belongs to the client or practice.

- ✓ Add the office name or client brand to the cover if desired.
- ✓ Insert screenshots of the actual software, portals, forms, or scheduling system used by the office.
- ✓ Add state-specific requirements and role limitations.
- ✓ Add provider preferences, office policies, and escalation rules.
- ✓ Add trainer signature lines or staff initials where sign-off is required.
- ✓ Review all privacy, safety, and scope sections before distribution.
- ✓ Export a clean PDF copy for the learner and a separate editable master for the trainer.

## CLIENT-READY REMINDER

Keep the base guide brand-neutral. Let the buyer add their own logo, tone, screenshots, and office-specific workflow so the product feels custom.