# When to Use 1st & 2nd Consultations

## **First Consultation (Initial Assessment)**

### Establish a Baseline

- •Conduct a full exam (diagnostics, X-rays, intraoral photos)
- •Understand the patient's needs

# Present Initial Recommendations

- •Provide an overview of suggested treatments
- Explain the necessity and importance of treatments

### **Build Trust and Educate**

Introduce the patient to the practice

- Discuss dental health
- •Answer immediate questions about treatments and costs

### **Outcome**

- Comprehensive exam completed
- Preliminary treatment plan developed
- •Determine the need for a second consultation

# **Second Consultation (Deep Dive and Decision Making)**

### **Reinforce the Treatment Plan**

- •Review detailed treatment steps (especially for complex procedures like implants or orthodontics)
- Clarify any patient doubts

### **Discuss Costs and Insurance**

Provide detailed cost estimates

•Confirm insurance benefits, copays, and financing options

### **Build Commitment and Take Next Steps**

- Include a small initial treatment step (e.g., impressions for dentures, spacers for orthodontics)
- •Solidify the patient's commitment to treatment

#### **Outcome**

Address patient concerns

- •Establish concrete next steps
- Confirm patient readiness to proceed

	Aspect	1st Consultation	2nd Consultation
<b>⇒</b>	Purpose	Initial assessment, build rapport	Deep dive into details, confirm understanding
	Focus	Diagnosis, initial treatment overview	Cost clarity, detailed procedure steps
	Patient Role	Listening, asking questions	Confirming commitment, making decisions
	Key Outcomes	Comprehensive exam, preliminary plan	Addressed concerns, concrete next steps
	Financial Discussion	General overview	Detailed breakdown with insurance insights
	Follow-up Action	Book 2nd consult if necessary	Small initial treatment step, if ready

Comparison of 1st and 2nd Consultations