Sample Form: Objection Crusher Form

Use this form during or immediately after a treatment plan discussion when a patient hesitates.
Keep a printed copy at your TC desk or front desk binder.

Patient Name: _____
Date of Discussion: _____
Proposed Treatment: _____

What Was the Patient's Initial Objection?

Check all that apply:
□ "I need to think about it."
□ "It's too expensive."
□ "I need to talk to my spouse."
□ "I'm scared / nervous."
□ "It's not urgent, right?"
□ Other: _____

Follow-Up Questions (Use at least one)

- "Just so I understand, is it the treatment itself, the timing, or the cost that's giving you pause?"
- "Would it help if I broke this down into steps or payment options?"
- "Can I answer any questions while it's still fresh in your mind?"
- "Would it help if the doctor gave a bit more clarity on why this was recommended today?"

Notes from the Conversation

(Use this space to write any key points or emotional cues from the patient)

_____

_____

_____

_____

Follow-Up Plan

Check all that apply:
□ Sent email with treatment + financing breakdown
□ Scheduled a follow-up call (date: _____)
□ Offered CareCredit or in-house financing
□ Printed a copy of treatment + visual aid for spouse
□ Provided comparison of "wait vs. treat now" outcome
□ Booked phased treatment
□ Patient requested no follow-up

continued...

Internal Reflection (Treatment Coordinator or OM)

- Was I clear about the urgency?
- Did I provide confidence, not pressure?
- Did I confirm understanding?
- Did I handoff properly to the front desk?

Things I'll improve next time:

_____

_____

_____

_____

Keep this on file in the patient's notes or scan it into the chart if needed.

Want to improve team objection handling? Review this form during monthly meetings and role-play responses!