

DENTAL BUSINESS OS[®]

Dynamic Follow-Up

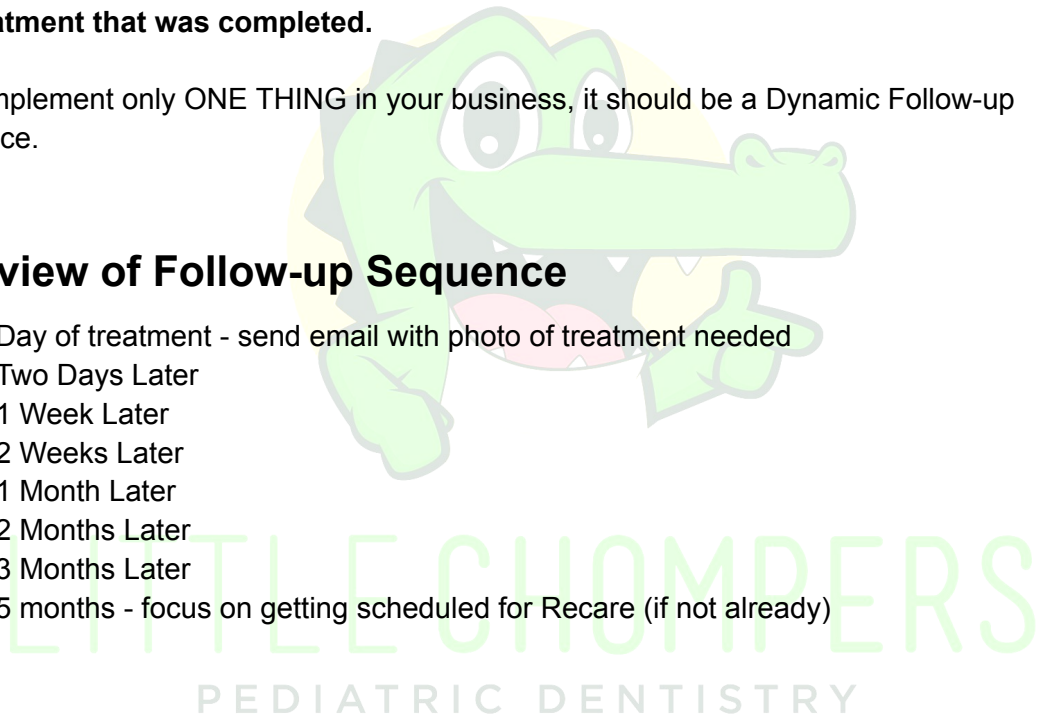
- As the guardians of our patient's oral health, we need to "care more than they care."
- Our patients are incredibly busy, it is easy for our patients to put off treatment just because other things come up as distractions.
- By performing consistent, dynamic follow-up, we are helping our patients get the care they need, desire and deserve.
- If our patient does not schedule at the Initial Financial Case Presentation, the following process should be followed to ensure patient is contacted to schedule diagnosed treatment.

We scheduled over \$3.8M of treatment from follow-up calls in 2023. This is 54.7% of all the treatment that was completed.

If you implement only ONE THING in your business, it should be a Dynamic Follow-up Sequence.

Overview of Follow-up Sequence

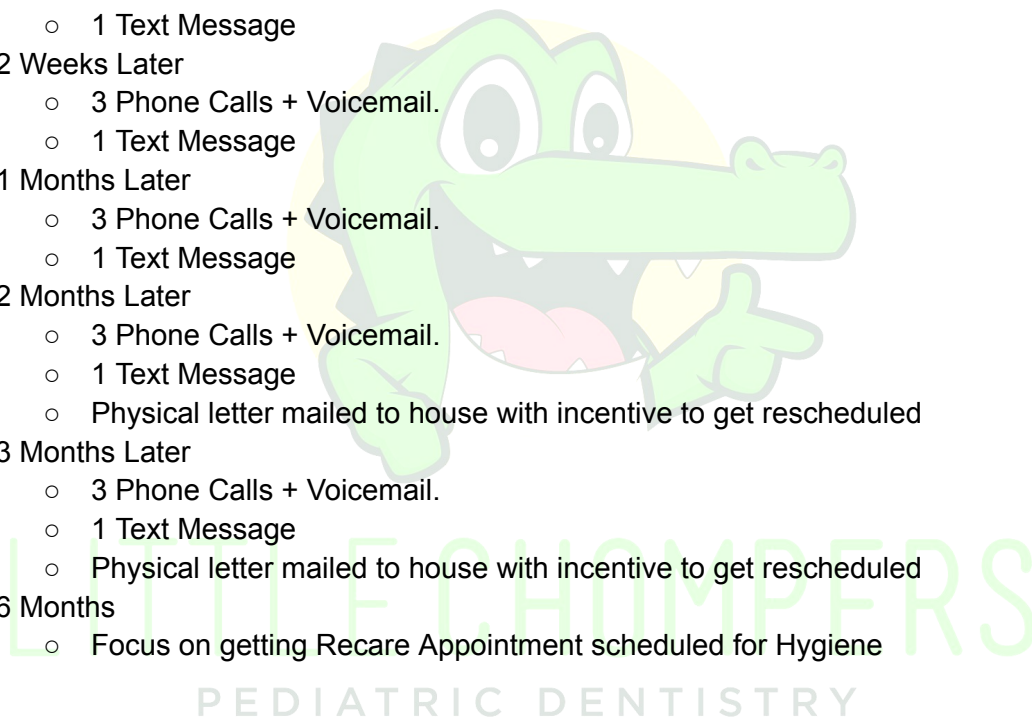
- Day of treatment - send email with photo of treatment needed
- Two Days Later
- 1 Week Later
- 2 Weeks Later
- 1 Month Later
- 2 Months Later
- 3 Months Later
- 5 months - focus on getting scheduled for Recare (if not already)



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Details of Sequence

- Day treatment is presented in the office.
 - Immediately send email with photograph of biggest concern area
 - Include personalized note about treatment plan
 - Remind patient that we will be calling in two days to discuss
- 2 Days later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
- 1 Week Later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
- 2 Weeks Later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
- 1 Months Later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
- 2 Months Later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
 - Physical letter mailed to house with incentive to get rescheduled
- 3 Months Later
 - 3 Phone Calls + Voicemail.
 - 1 Text Message
 - Physical letter mailed to house with incentive to get rescheduled
- 6 Months
 - Focus on getting Recare Appointment scheduled for Hygiene



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Script

Phone Call: 2 days - 1 month

Office: "Hi Ms. Jones, this is Nancy from Little Chompers, how are you today?"

Patient: "Oh, I'm good, thanks."

Office: "Nancy, I know we spoke on Tuesday and I was going to follow-up with you today to get you scheduled. I know you needed to talk to your husband prior to getting scheduled, were you able to speak with him?"

Note that we are utilizing the information gathered from the Financial Case Presentation and speaking to the reason they didn't initially schedule. This helps the patient feel heard.

Phone Call: After 1 month

Office: "Hi Ms. Jones, this is Nancy from Little Chompers, how are you?"

Patient: "I'm good, thanks"

Office: "Nancy, Dr. Kiser was reviewing his charts and saw that you hadn't scheduled for that crown on the upper left. If you remember, that was the tooth with the big cavity and a hole. We were concerned if you don't take care of it soon, it might start causing pain. Dr. Kiser has some availability this Tuesday at 9a or Thursday at 3p. Which one of those spots would work better for you?"

Text Message

"Hi Johnny, this is Amanda from Little Chompers Pediatric Dentistry. I am texting to follow-up about the crown on the upper left that we discussed when you were in the office. We have availability this week to get you in. Would Tuesday at 1p or Thursday at 4p work better for you?"

Voicemail

"Hey Ms. Jones, this is Nancy from Little Chompers. I'm giving you a call because Dr. Kiser wanted me to follow-up and get you scheduled for the tooth on the upper left that was cracked. He wanted to make sure you get in ASAP to get that taken care of. Please feel free to call back and we can get you scheduled."

Email - Immediately Following Visit

Hi Ms. Jones,

So nice to meet you today and review your treatment for the crown on your upper left. As discussed, if we don't take care of it soon, this decay may start to cause pain for your child.

I will call you in 2 days like we discussed after you've had a chance to discuss with your husband.

Thank you so much for trusting us with your dental care,
Mark at Little Chompers Pediatric Dentistry

Email - If following up on Outstanding Treatment after No Follow-ups

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Hi Ms. Jones,

This is Mark from Little Chompers Pediatric Dentistry! I trust this email finds you well. Dr. Kiser was just reviewing his charts from earlier this year and he realized that you had never scheduled for the crown on your upper left that you discussed at your last visit.

We know life gets busy, so we wanted to reach out to support you in getting scheduled. As you know, dental care that isn't addressed will usually just get worse and more costly to repair. One of our most common dental emergencies is a tooth with a large cavity either causing pain or an infection. We want to avoid this for your child!

I will also follow-up via text and phone call.

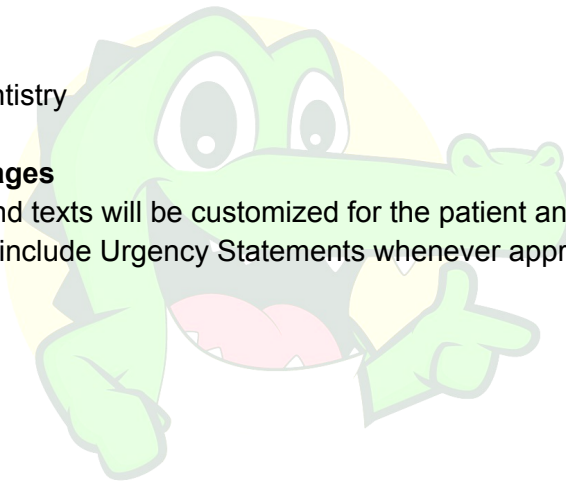
All our best,

Denise

Little Chompers Pediatric Dentistry

Note on Email & Text Messages

Remember the best emails and texts will be customized for the patient and their situation (not generic scripts). They should include Urgency Statements whenever appropriate.



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Detailed Process

Financial Case Presentation

- During Financial Case Presentation (in office) we should have informed the patient that we will be following up in 2 days to discuss scheduling.
- The reason why the patient is not scheduling should be documented in the [Treatment Plan Acceptance Tracking Document](#) and in the Practice Management Software Communications Log.
 - *Note: We discuss every treatment plan that did not schedule in our Morning Opportunity Meeting the following day*
- **MUTTS = Money, Urgency, Time, Trust, Scared**
 - These are the only 5 reasons why a patient doesn't schedule. We must determine what reason it is during the Financial Presentation process.

Dynamic Follow-up

- Each Business Team Member tracks every phone call that is made out in the office for their own personal KPI.
 - This is their "Measurable" and **their bonus is determined** by if they made their calls out are not.
- We track the **Total Follow-up Calls Out** on our **Daily Whiteboard**
 - This is a driving Lead Indicator in the business
 - This is also tracked on our **Practice Dashboard**
- It's very common for team members not to want to make their Calls Out. It's important we track, celebrate and reward this to ensure it is completed.
- If this is difficult to implement with the team, then **start with 2 calls/day**. There is no reason that the team won't have time to complete 2 calls/day. We owe it to our patients to do this.

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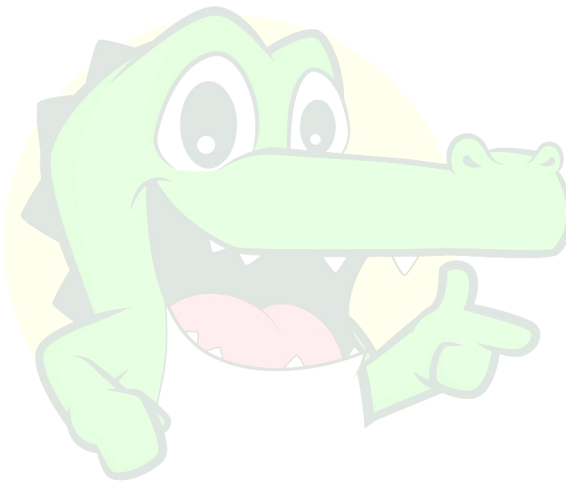
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Implementation

- We must have a system to track how many calls were made and how much treatment was scheduled from these calls.
- If you aren't tracking this, you have no way of knowing if its working.
- We divide this up for every team member in our office with some being responsible for more calls than others.

Dental Intel

- We use Dental Intel internally to track and implement Dynamic Follow-ups.
- This gives the best integration of overdue treatment, overdue recare and ability to set the follow-up dates.

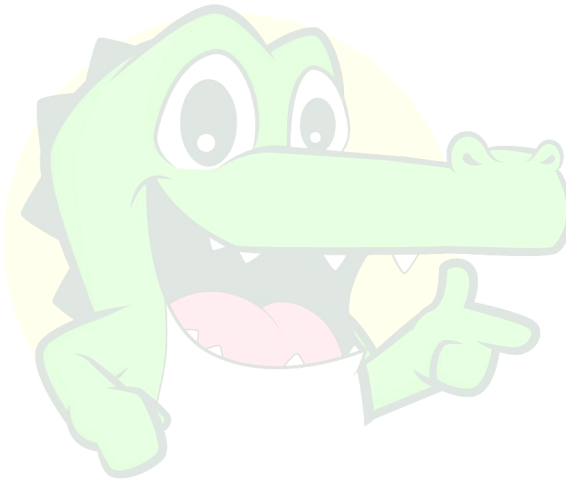


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File Folder Method

- This was the method we used at Heartland Dental prior to the more sophisticated methods above. It's simple but it works.
- Have a file folder holder with 30 folders inside. One folder for each day of the month.
- If the patient does not schedule treatment, place the Patient's Treatment Plan in the appropriate day for follow-up.
- After the calls & texts have been made, move the patient's Treatment Plan document to the next day/week that we will follow-up.
- Ideally, we are using this method in conjunction with a tracking spreadsheet because we need to track how many calls have been made.



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