

Presenter Information: Andrea Gallimore

- Former office manager
- Certified Dentrrix Trainer
- 24 years of experience with Henry Schein One software
- Product Manager at HS1
- Active podcast host, educational seminar presenter, and published author in dental publications



Patient Communication



In this session, you'll learn about:



Regular, Personalized
Communication



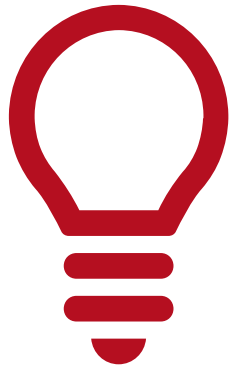
Simplify Your Email
Campaign Management



Offer 24/7 Scheduling



Tools to Attract Patients



REGULAR, PERSONALIZED COMMUNICATION

Why is personalized communication important?



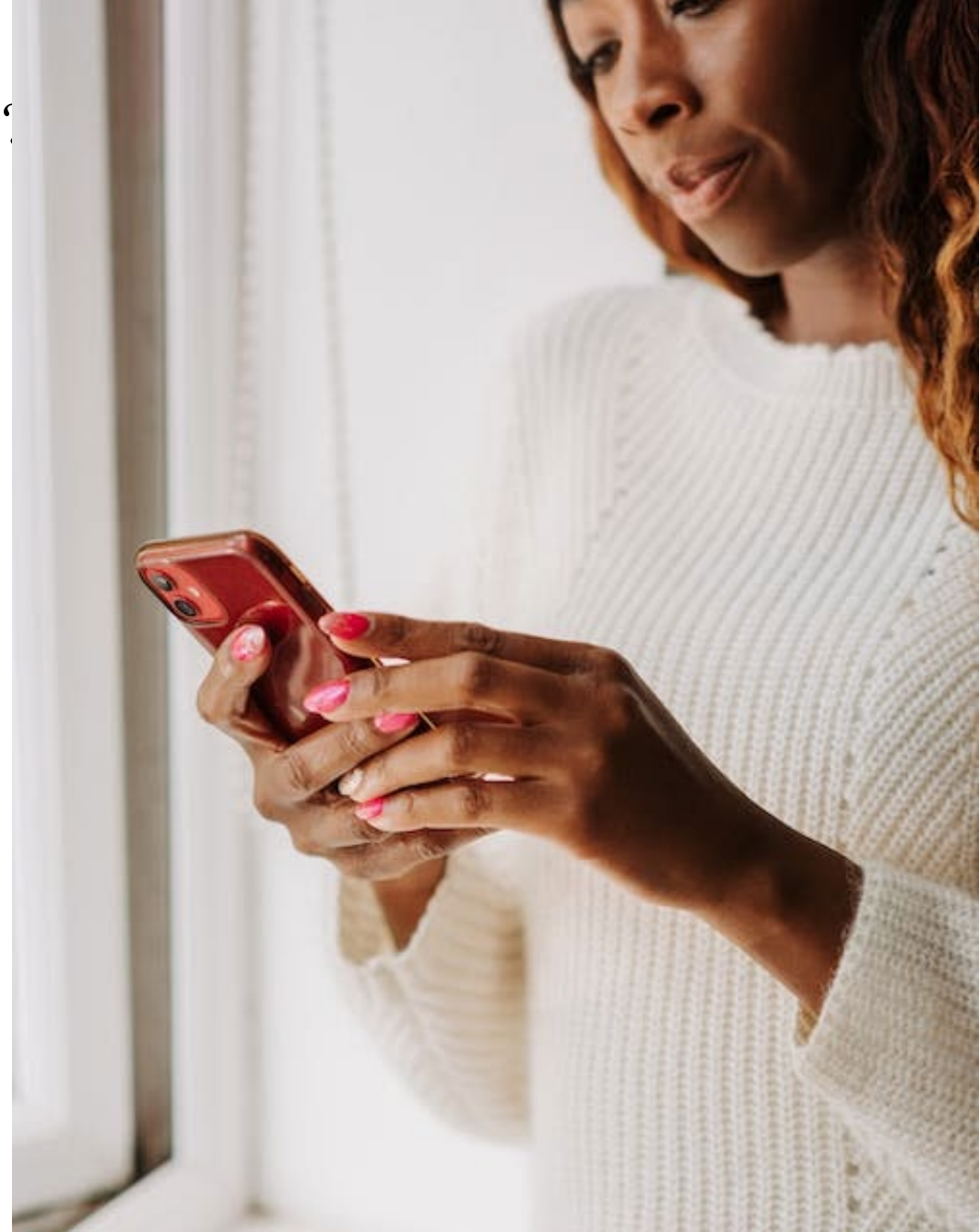
Preference



Convenience

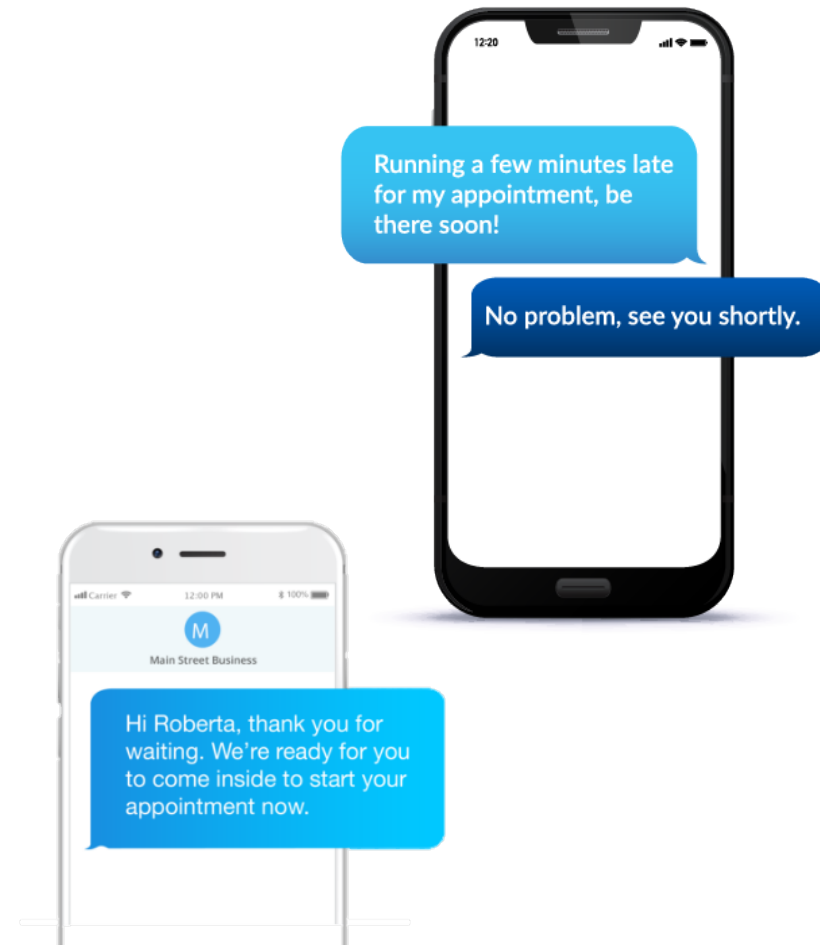
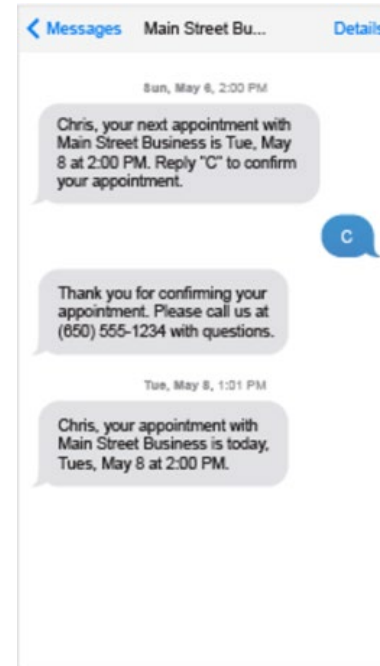


Personalize



Communicate via preferred method

- Appointment reminders
- Review request
- Two-way text
- Check-in/ out



Automated Appointment Reminders

- Customizable email and text timelines
- Customizable confirmation messages
- Custom procedure specific plans

The image shows two overlapping screenshots from a software interface. The background screenshot is titled "Reminder Settings" and displays a list of reminder plans. It includes a "DEFAULT PLAN" section with a "Default" plan (turned ON) and a "CUSTOMIZED PLAN" section with "New Patients" and "Surgery" plans (both turned ON). A timeline diagram shows "Appointment Scheduled" leading to "Save the Date Shortly After Appointment Scheduled". The foreground screenshot is titled "Edit Message" and shows a text input field for a reminder message. The message text is: "Gallimore Dentistry: Reply C or tap {{AppointmentConfirmPage}} to confirm {{CustomerFirstName}}'s appt on {{AppointmentDateTime}}. Can't make it? Call (801) 847-4517". Below the text, it says "Reply C or tap {{AppointmentConfirmPage}} to confirm your appt STOP=End msgs HELP=Help" and "-6 characters left". There are "CANCEL" and "CONTINUE" buttons at the bottom of the modal.

Reminder Settings

You have 3 reminder plans in total, 3 in use

DEFAULT PLAN

- Default** Procedure Related All with Exclusions

Appointment Scheduled → *Save the Date Shortly After Appointment Scheduled*

CUSTOMIZED PLAN

- New Patients** Procedure Related RESIN-THREE SUP
- Surgery** Procedure Related Root Canal

Edit Message

Reminder text

+ INSERT CUSTOM TAG

Gallimore Dentistry: Reply C or tap {{AppointmentConfirmPage}} to confirm {{CustomerFirstName}}'s appt on {{AppointmentDateTime}}. Can't make it? Call (801) 847-4517

Reply C or tap {{AppointmentConfirmPage}} to confirm your appt STOP=End msgs HELP=Help

-6 characters left

CANCEL CONTINUE

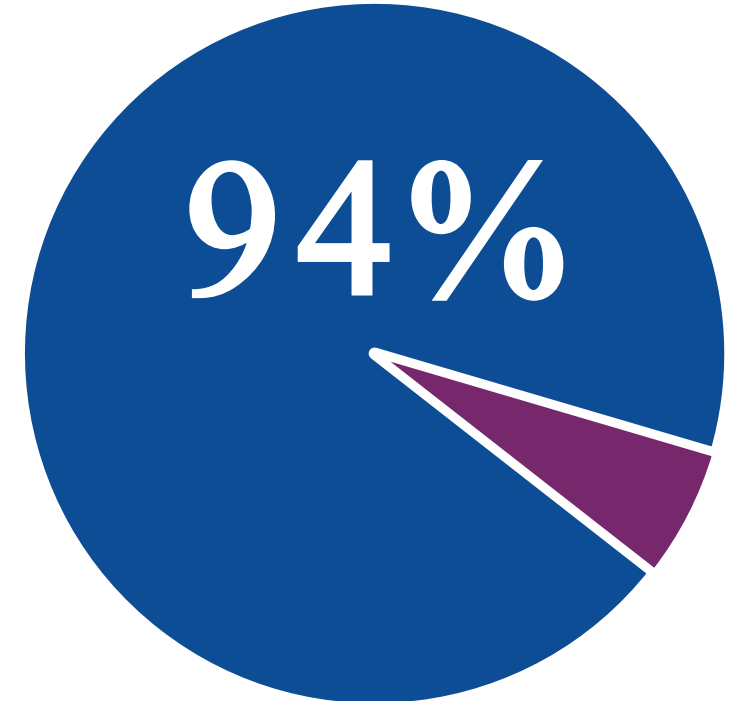
Personalize with Procedure-based Reminders

- Create Custom Plans
- Procedure-specific instructions

The screenshot displays the 'Create Custom Plan' interface in the DENTRIX HUB. The left sidebar is blue and contains the following menu items: Dashboard, Appointments (highlighted in red), Patients, Results, LEADS, COMMUNICATIONS, MARKETING, and OPINION MANAGEMENT. The 'Appointments' menu is expanded to show 'Calendar' and 'Reminder Settings' (also highlighted in red). The main content area is white and features a search bar at the top with the text 'Search patients'. Below the search bar is a 'Back' button and the title 'Create Custom Plan'. The form is divided into sections: 'General Info' with fields for 'Reminder Name' (containing 'Sedation Instructions') and 'Procedure' (containing 'Deep sedat/gen anesth- 1st15min'). Below the 'Procedure' field is a warning message: 'This plan of reminders applies to appointments that include the above procedures. Some of your text reminders, including substitute reminders, may not be sent out due to TCRA regulations. [Learn More](#)'. The 'Save the Date' section has two options: 'Sent one day after the appointment is scheduled' (with an 'Email' sub-option) and 'Shortly after the appointment is scheduled'. At the bottom right, there are 'CANCEL' and 'SAVE PLAN' buttons.



**OFFER 24/7
SCHEDULING**



*Lisa Hedges, [“Online Booking Options Can Get You More Clients,”](#) GetApp, April 7, 2021.

What Can I Do With Online Booking?

- Customizing appointment reasons
- Customizing available providers and schedules
- Getting the booking link on your social media page
- Viewing appointments booked online

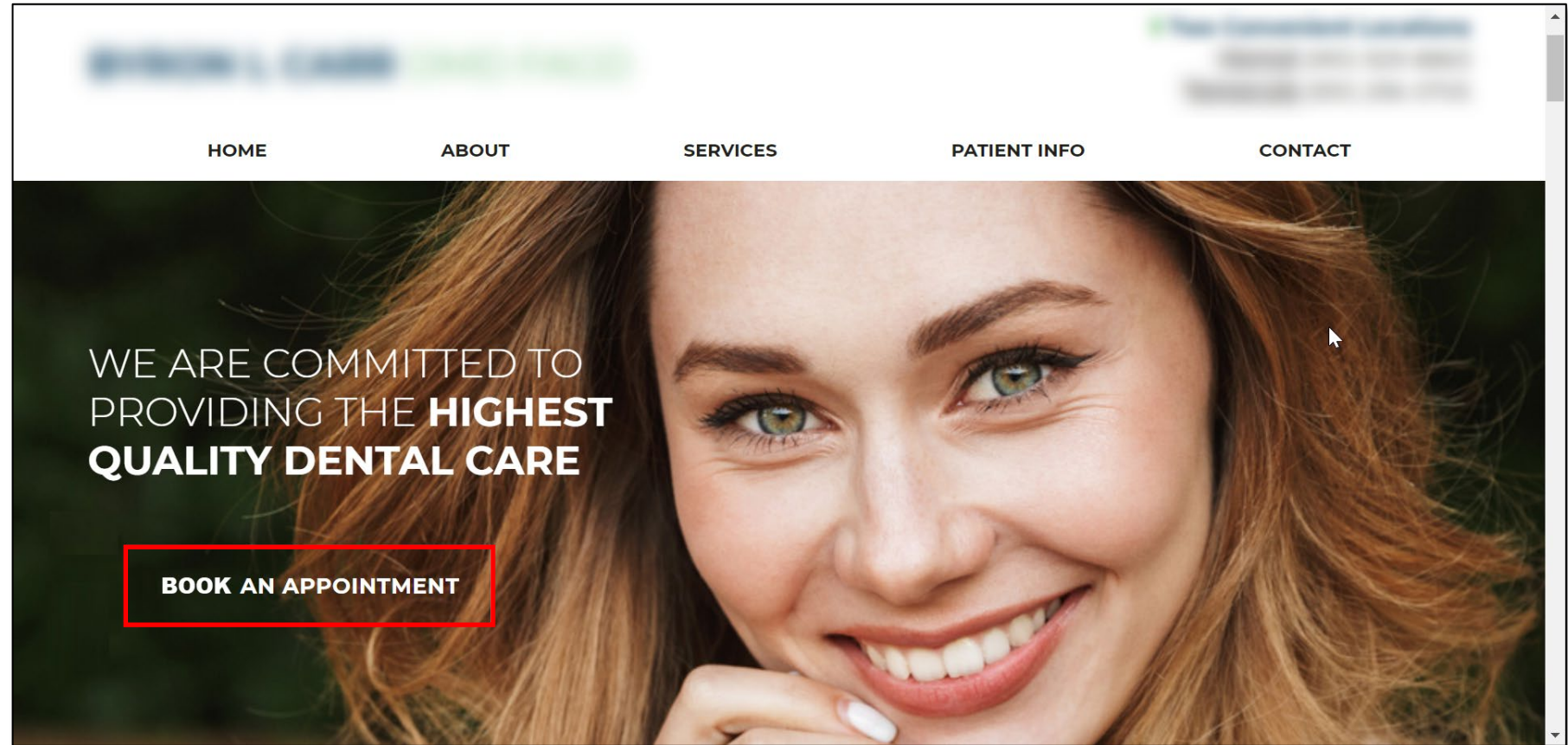


Scenario: New Patient

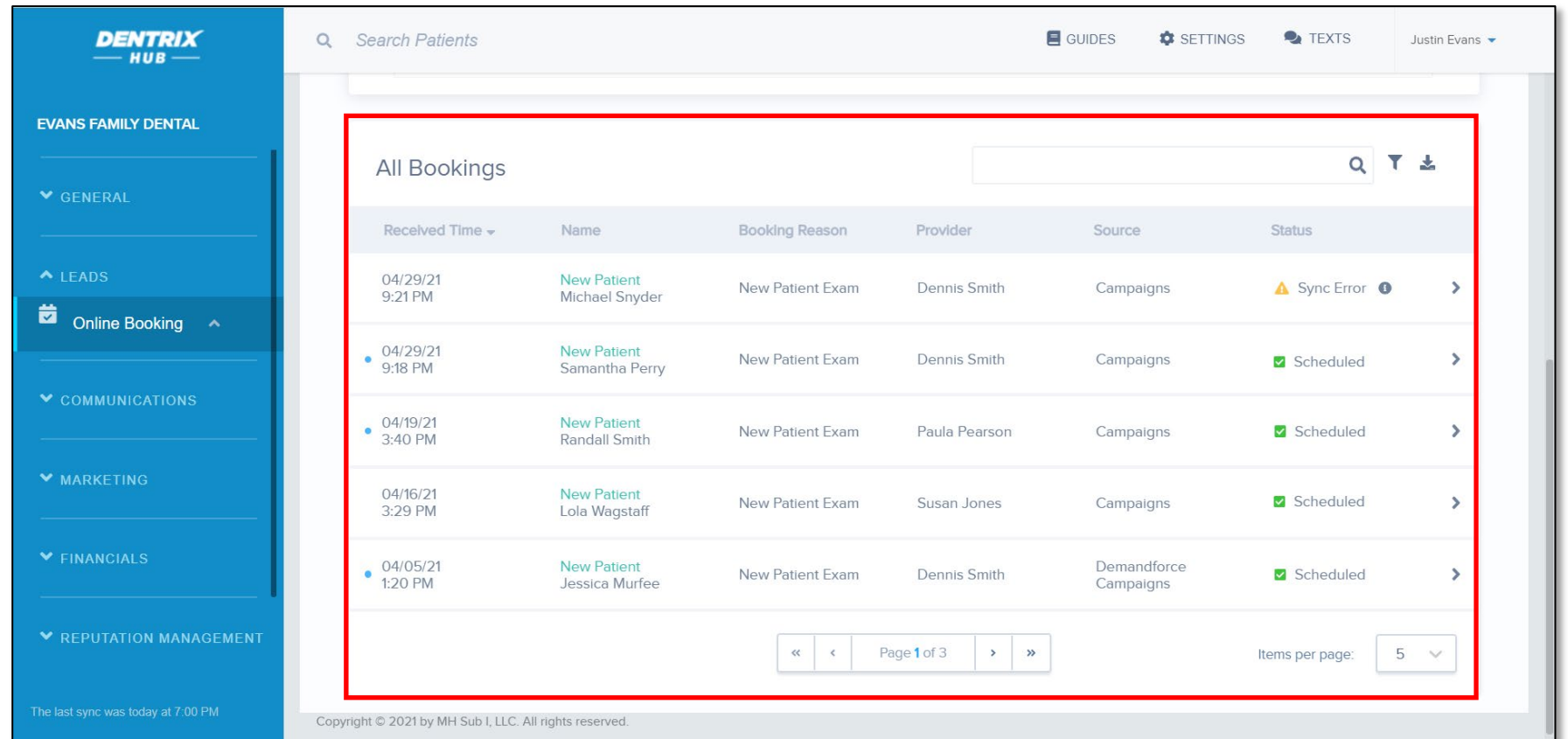
- Has a broken tooth
- It's after hours, and clicks on your online booking link



First, She sees a link on your website to book online.



Manage the booking from the Booking Center



The screenshot displays the Dentrix Hub interface for 'EVANS FAMILY DENTAL'. The left sidebar contains navigation menus for GENERAL, LEADS, Online Booking (selected), COMMUNICATIONS, MARKETING, FINANCIALS, and REPUTATION MANAGEMENT. The main content area is titled 'All Bookings' and features a table with columns for Received Time, Name, Booking Reason, Provider, Source, and Status. The table lists five bookings, with the first one showing a 'Sync Error' and the others as 'Scheduled'. A pagination bar at the bottom indicates 'Page 1 of 3' and 'Items per page: 5'. The footer includes the text 'The last sync was today at 7:00 PM' and 'Copyright © 2021 by MH Sub 1, LLC. All rights reserved.'

DENTRIX HUB

EVANS FAMILY DENTAL

GENERAL

LEADS

Online Booking

COMMUNICATIONS

MARKETING

FINANCIALS

REPUTATION MANAGEMENT

The last sync was today at 7:00 PM

Search Patients

GUIDES SETTINGS TEXTS Justin Evans

All Bookings

Received Time	Name	Booking Reason	Provider	Source	Status
04/29/21 9:21 PM	New Patient Michael Snyder	New Patient Exam	Dennis Smith	Campaigns	Sync Error
04/29/21 9:18 PM	New Patient Samantha Perry	New Patient Exam	Dennis Smith	Campaigns	Scheduled
04/19/21 3:40 PM	New Patient Randall Smith	New Patient Exam	Paula Pearson	Campaigns	Scheduled
04/16/21 3:29 PM	New Patient Lola Wagstaff	New Patient Exam	Susan Jones	Campaigns	Scheduled
04/05/21 1:20 PM	New Patient Jessica Murfee	New Patient Exam	Dennis Smith	Demandforce Campaigns	Scheduled

Page 1 of 3

Items per page: 5

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**SIMPLIFY YOUR
EMAIL
CAMPAIGN
MANAGEMENT**

Why do Patients Like Email Messages?



Reminders



Personalization



Connection

*Source: [https:// www.netomi.com/ email-best-customer-support-experience](https://www.netomi.com/email-best-customer-support-experience)

*Source: [https:// www.lh360.com/ proof/](https://www.lh360.com/proof/)



Why do Office Managers Like Email Messages?



Frees Up Time



Decreased No-Shows



Improved Recall and
Reactivation

*Source: <https://www.lh360.com/proof/>



Plan your year in advance with customized “set-it-and-forget-it” email campaigns.

- Newsletters
- Educational content
- Treatment specials
- Segmented reach
- Patient reviews
- Set it and forget it!

The screenshot shows the DENTRIX HUB interface for Evans Family Dental. The left sidebar contains navigation options: GENERAL, LEADS, COMMUNICATIONS, MARKETING (highlighted with a red box), Postcards, Referrals, and DF Local. The main content area is titled "Campaign Builder" and features a search bar for patients. Below the search bar, there are tabs for "Email Campaigns" and "Texts". The "Email Campaigns" section prompts the user to "Select a template category & see template options below" and lists five categories: Seasonal, Promote, Educate Clients (highlighted with a green box), Build Reputation, and Custom. Each category includes a brief description of the campaign type. Below the categories, there is a section for "Educate Clients Campaign Templates" with a search bar for template names. The interface also includes a search bar for patients, navigation icons for GUIDES, SETTINGS, and TEXTS, and a user profile for Justin Evans.

Patient Communications

- Re-Care Campaigns

Happy Tooth Dental
123 Pelican Bay Blvd
Naples, FL 12345
(801) 847-4794

Dear Frank,

We've missed seeing your smile. We are sending this friendly reminder because our records indicate you are due for your next appointment.

Regular cleaning visits are essential to a healthy smile and the care that fits your lifestyle. Click [here](#) to request your next appointment.

Please call us at (801) 847-4794 if you have any questions.

See you soon,

Happy Tooth Dental
(801) 847-4794
jessica.mullins@henryschein.com
<https://www.ident.ws/mullinsdentalarts>

(801) 847-4794 | 123 Pelican Bay Blvd

Appointments | Review Us

Book An Appointment
How can we help you?

1 2 3

This appointment is for:

New Patient
 Returning Patient

Location:
Gallimore Dentistry
1220 South 630 East, American Fork, UT

Booking Center

75 TOTAL (33 Spoken)
39 New Patient (25 Spoken)
36 Returning Patient (8 Spoken)

6 TOTAL (6 Spoken)

43% New Patient Exam
21% Emergency Exam
21% Check Up & Cleaning

60% Gallimore Dentistry
20% Consumer Point
10% Dermatology
5% American Fork
3% Royal
1% Google

All Bookings

Booked Time	Name	Booking Reason	Provider	Source	Status
05/15/22 10:00 AM	New Patient - Dental Exam	New Patient Exam	Mark Gallimore, DMD	Gallimore Dentistry	Sync Error
05/15/22 10:00 AM	New Patient - Xray Exam/Review	New Patient Exam	Mark Gallimore, DMD	Gallimore Dentistry	Accepted
05/15/22 8:00 AM	New Patient - New Recorcer	New Patient Exam	Mark Gallimore, DMD	Gallimore Dentistry	Scheduled

- ✓ Fill empty appointment times
- ✓ Increase revenue
- ✓ Customizable timeline
- ✓ Bring back lost patients
- ✓ Online booking



**TOOLS TO
ATTRACT
PATIENTS**

Why utilize automated reviews?



Increased Patient Reviews



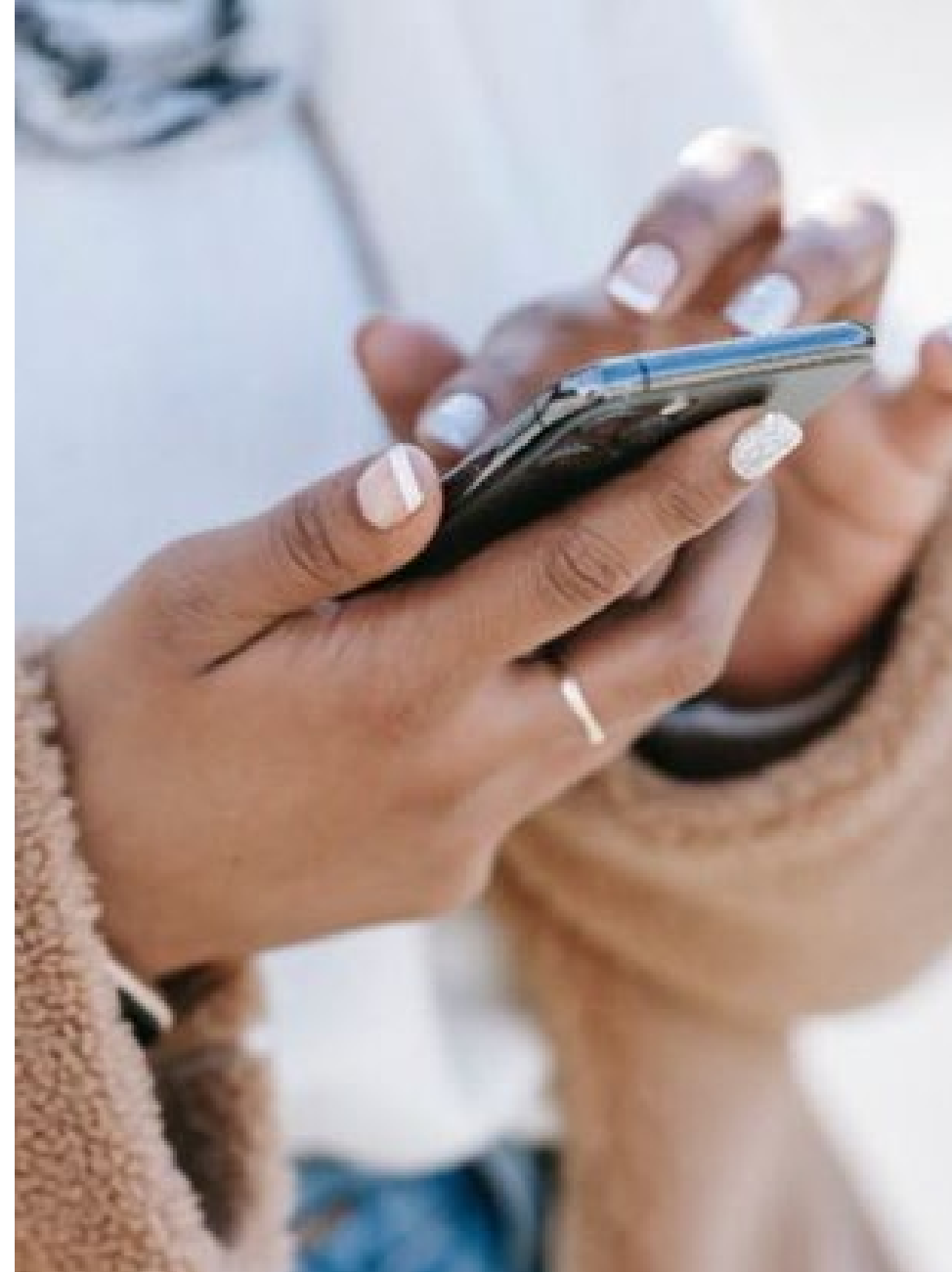
Improved Online Presence



Attracting New Patients

*Source: https://www.jarvisanalytics.com/blog/dental_patient_reviews/

*Source: <https://www.lh360.com/proof/>



What are Intelligent Reviews?

Scenario

- Imagine that you're focusing on increasing online reviews for Facebook and want to maintain your well-established presence on Google and WebMD
- You can set up your review requests so that Patient Engage invites
 - ✓ **50%** on Facebook
 - ✓ **25%** on Google
 - ✓ **25%** on WebMD





THANK YOU



Q & A