

The Dental Follow-Up System

This system shows your team exactly how to follow up, what to say, and how to turn hesitation into commitment.




The Follow-Up Reality Most Practices Miss


Patients are not saying no, they are delaying decisions for a variety of reasons.

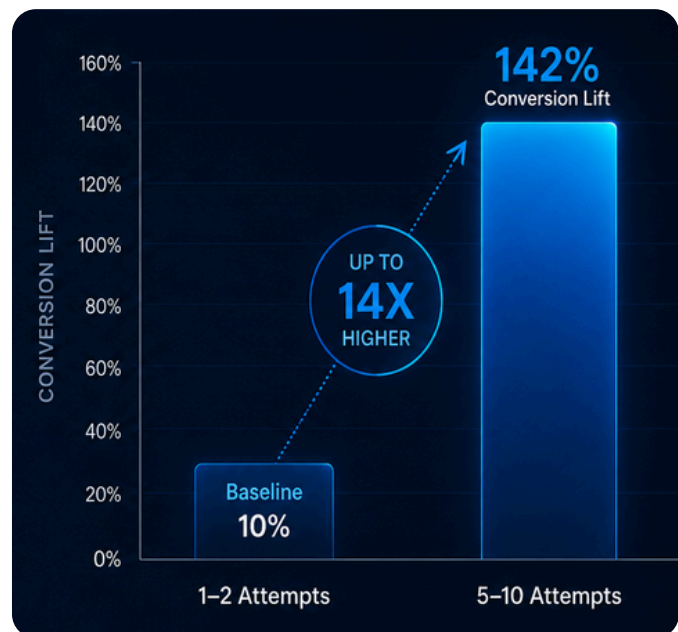
If your team only follows up once or twice, you are not losing patients because they are not interested. You are losing them because the system stops too early.

What high-growth practices understand:

 It takes 5+ follow-ups to gain commitment.

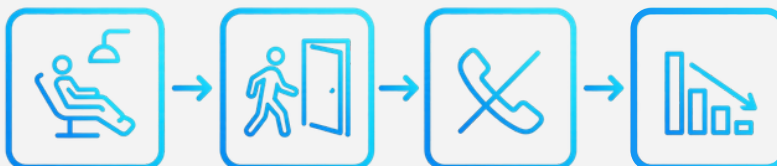
 Larger cases may take 8–10 touchpoints.

 Follow-up is not an event, it is a system.












Key Question

How much unscheduled treatment is sitting in your system right now simply because no one followed up enough?

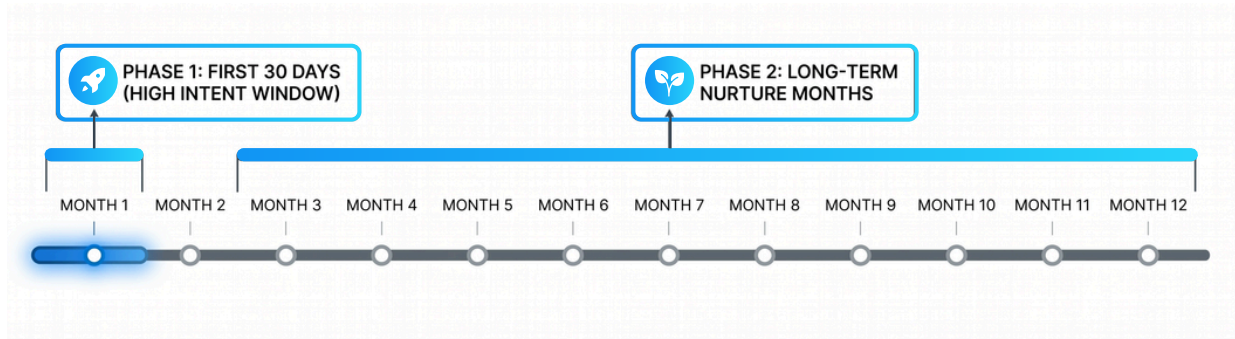


The Complete Follow-Up Timeline

Phase 1: First 30 Days (High Intent Window)	
Day 1 (Same Day)	 Call + Text
Day 3	 Call
Day 4	 Text
Day 5	 Email
Day 7	 Call
Day 10	 Text + Email
Day 14	 Call
Day 21	 Text
Day 25	 Call
Phase 2: Long-Term Nurture (Months 2-12)	
<ul style="list-style-type: none">• Monthly follow-up using mixed channels• Educational content, reminders, and check-ins• Continue until patient schedules or declines permanently	

 **Key Insight:**

If your system stops after 1–2 weeks, you are cutting off the majority of your conversions.



Multi-Channel Follow-Up Scripts

Touchpoint	Scripting
Same Day Call (Emotional + Open Loop)	<p><i>"Hey [Patient Name], this is [Team Member] from [Practice]. I wanted to check in after your visit today. I know you mentioned needing time to think about your treatment. What questions came up after you left?"</i></p> <p>Layer in Concern: <i>"What concerns me is I have seen cases like this become more involved when they are delayed, so I just want to make sure you have everything you need to make the best decision."</i></p>
48 Hour Follow-Up Text	<p><i>"Hi [Patient Name], this is [Practice]. Just wanted to check in, have you had a chance to think about the treatment we discussed? Happy to answer any questions or walk through options with you."</i></p>
1 Week Call (Reframe + Consequence)	<p><i>"Most patients in your situation usually want to take care of this before it becomes more serious or more costly. Where are you at with everything we talked about?"</i></p>

**Email Follow-Up
(Value +
Education)**

Subject: Quick follow-up on your visit

*"Hi [Patient Name],
I wanted to follow up on your visit and
make sure you have everything you
need to move forward comfortably.*

*I've included a quick resource that walks
through the treatment we discussed so
you can review it at your own pace.*

*If any questions come up, I'm here to
help."*

**Letter Script
(High Impact
Touch)**

*"Hello [Patient Name],
Dr. [Name] was reviewing your case and
wanted me to personally reach out.*

*We are concerned that delaying your
treatment could lead to more discomfort
or more complex care in the future.*

*Your health is important to us, and we
want to make sure you are taken care of
at the right time.*

*Please reach out so we can reserve a time
that works best for you."*

Video Follow-Up (Optional)

Send a short educational video explaining:

- The condition
- What happens if untreated
- What the procedure involves

This increases clarity and reduces fear.

Objection Handling Scripts

OBJECTION	RESPONSE
"I need to think about it"	Response: <i>"That makes sense. When you say think about it, what part are you still unsure about?"</i>
"I will call back later"	Response: <i>"Totally understand. Just so we do not lose track, when would be a good time for me to follow up with you?"</i>



Permission-Based Follow-Up (This Changes Everything)

Follow-ups fail because it feels unexpected, intrusive, or simply irrelevant to the recipient.

Effective follow-up should never come as a surprise. It requires a foundation layer of communication where the patient is made aware that follow up will happen and, more importantly, why. This initial expectation-setting is the critical difference between a welcomed check-in and an annoying interruption.

Our top-performing practices follow up using this scripting:

At the end of every conversation:

"I understand you want to think about it. Do you mind if I follow up with you next week to see where you are at?"

If yes:

"Perfect. What day tends to work best for you?"

If unsure:

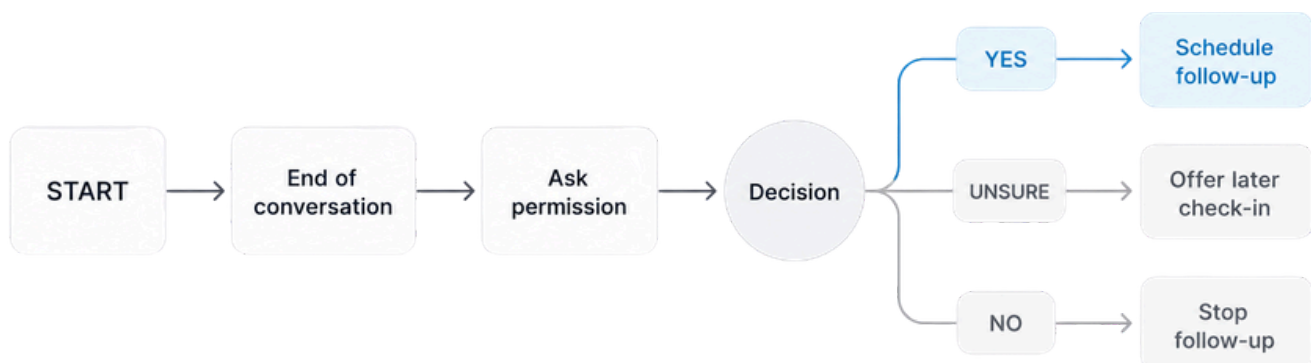
"No problem at all. Would it be helpful if I checked in after you have had time to think it through?"

Why this works:

Removes resistance

Sets expectation

Increases response rate



Emotional Drivers That Increase Case Acceptance

Uncertainty and fear, not logic, are the primary reasons patients hesitate. Your follow-up strategy must effectively tackle both.

Use language like:

- “What concerns me is...”
- “What we typically see when this is delayed...”
- “I just want to make sure this does not turn into something bigger for you...”

Balance:

- Care, not pressure
- Guidance, not selling
- Clarity, not confusion



Key Insight:

If your follow-up does not create emotional clarity, patients will stay stuck.



The Follow-Up Tracking System

If it is not tracked, it does not happen consistently.

Every patient with unscheduled treatment should have:

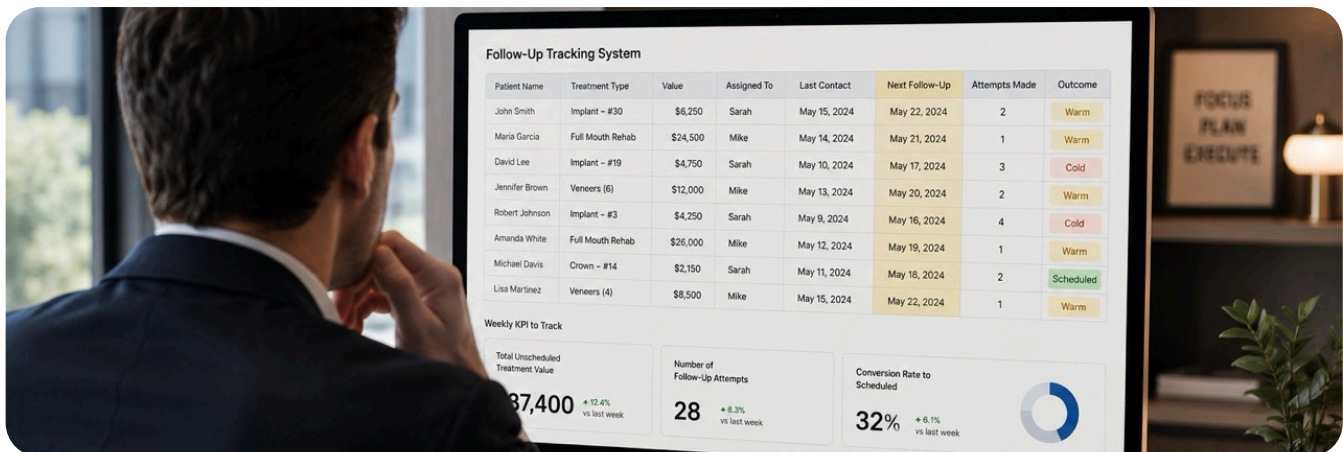
- ✓ Assigned team member (owner)
- ✓ Total treatment value
- ✓ Last contact date
- ✓ Next scheduled follow-up
- ✓ Notes from each interaction
- ✓ Status (cold, warm, scheduled)

Simple Tracking Structure:

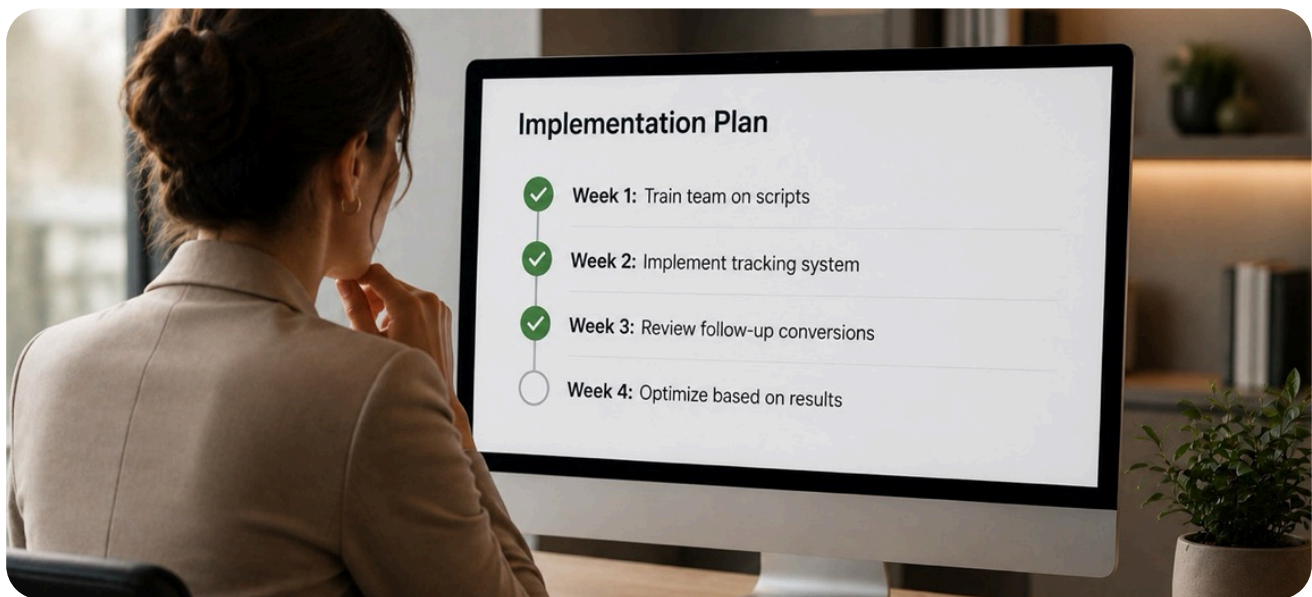
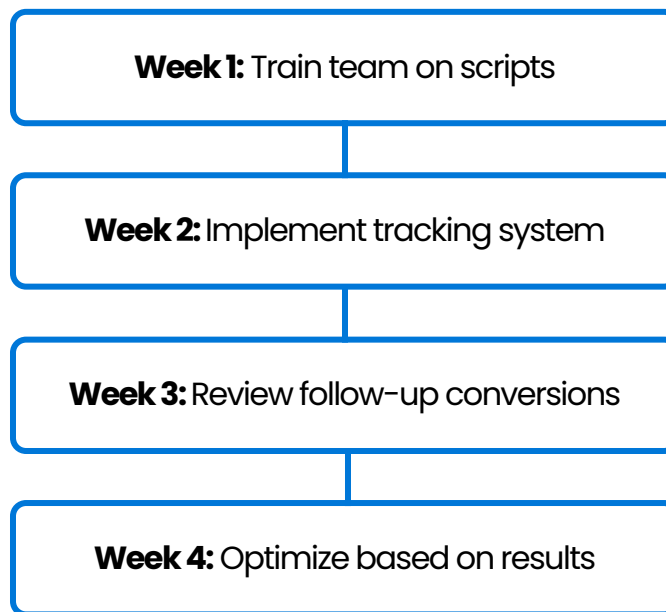
Patient Name	Treatment Type	Value	Assigned To	Last Contact	Next Follow-Up	Attempts Made	Outcome
XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Weekly KPI to Track:

- Total unscheduled treatment value
- Number of follow-up attempts
- Conversion rate to scheduled



Implementation Plan



Key Question

If your team followed up consistently for 30 days, how much additional production would you recover?