COMPLETE GUIDE TO

Dental Call Tracking Software

Everything you need to know about call tracking software.


PATIENT PRISM®

Chapter 1

What is call tracking and recording?

What problems does Call tracking solve?

◊   Call tracking informs your marketing spend

◊   Call tracking improves the customer service experience

Even if your dental practice has a website with an online appointment request form, the majority of new patients will make their initial contact with your practice over the phone. **Did you know that incoming phone calls initiate up to 50% of all conversions in a dental practice?**
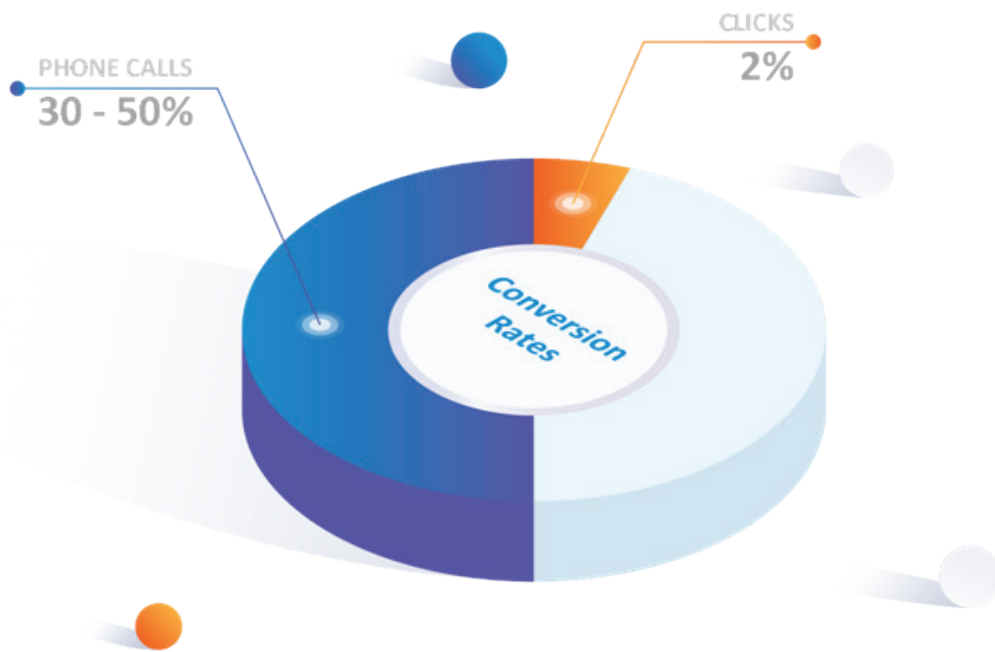
Businesses spend large amounts of resources to drive calls through marketing campaigns. But that alone isn't enough. While keeping the calls coming in is important, tracking and analyzing them is vital. **You could be losing 80% of conversions because you're not tracking your calls and gathering valuable insight from them.**

Yet, few dentists pay enough attention to analyzing inbound phone calls to gather insights about the performance of their operations.

That's where call tracking and analytics come in. Using this technology, you can track the most critical metrics, analyze them to collect valuable insights, improve your dental practice's processes, and help your team convert more leads into new patients.

Call tracking and conversation intelligence give you data-driven insights that your dental practice needs to engage your prospects better and increase your marketing ROI.

It makes it easier to generate more revenue when you have information on customers such as:

◊   Where they're calling from

◊   Which keywords they are mentioning on calls

◊   And the reasons for the call

You can also have information about how your staff performs on the calls and tips on improving phone receptionists' call handling skills.

If you're serious about taking your dental practice to the next level and start leveraging the power of artificial intelligence, dental call tracking combined with conversation analytics is precisely what you need to increase your business profitability and better serve your customers.

This guide has put together an in-depth analysis of call tracking and analytics in a dental practice environment.

What problems does Call tracking solve?

Dental organizations that undervalue call tracking and analytics will miss out on invaluable data and rely primarily on guesswork to improve their business performance.

◊   Let's start with marketing attribution. Call tracking helps businesses understand which specific marketing campaigns are driving calls. When companies have data on call attribution, it's easy to measure ROI. That allows you to change strategies and better allocate resources. The more you understand your calls, the more you can improve your campaigns and return on investment.

◊   Call recording and analytics provide a better understanding of the consumer journey and enhance human connection with your prospects. Consequently, you'll be able to improve your customer service and relationship with inbound callers.

◊   The insights you get from recorded conversations can be used for various purposes. The recordings can be used as training material for your representatives. Call transcriptions can be scanned to ensure a high-quality customer experience.

◊   You can ensure important keywords are being mentioned, understand the caller's intent, and know why the calls didn't end up in booked appointments.

Call tracking informs your marketing spend

Without data, it's tough to determine which campaigns to invest in, which to scale back, and which to shut down completely.

Here's a list of benefits of having a call tracking system in place and leveraging call recordings:

◊   See at a glance which channels and ads are leading to phone calls and which aren't

◊   Make decisions faster and with more authority

◊   Tweak your marketing budget to serve your goals better and improve ROI

◊   Understand the caller's intent, provide a superior customer experience, and boost conversions

Call tracking improves the customer service experience

Call tracking helps your dental reception staff better connect with incoming callers. Modern call tracking software provides your team with valuable information about incoming callers, such as which search terms and keywords they used to find your practice.

When your representatives know what the callers need assistance with, it's much easier to deliver efficient help and delight your prospects. Call recordings, often included with call tracking, can help you provide better staff training.

Suppose your front desk team consistently receives calls about dental implants, which are highly profitable procedures — here's what could be the case:

1. Your front desk staff might not understand the implant services you offer and thereby be unable to appropriately answer callers' questions about dental implants.

2. Your phone receptionists might fail to communicate the complimentary initial implant consultation you provide to prospective implant patients.

3. If your reps can't answer frequently asked questions about dental implants and make it easy for callers to learn what is possible, the callers might become discouraged and fail to book an implant consultation.

4. If your advertising is on point and generates a strong, high-quality lead, that lead could be squandered if the team member who answers the phone does not handle the call correctly and convert the lead into a booked appointment.

Now imagine you can listen to several phone calls about dental implants or any other specific procedure. By reviewing calls, you can coach your staff on what they could have done better to answer the patient's questions and encourage the patient to schedule time with the doctor.

Additionally, you can prepare FAQ scripts for each procedure your practice offers, making it easier for your staff to discuss dental services and procedures with prospects, ultimately converting more leads.

Call tracking solutions deliver actionable insights for informing, training, and coaching your team members to optimally converse with new dental patients over the phone. Your staff will become better prepared and expert at handling inquiries about dental procedures.

Envision how satisfied your patients will be when they receive helpful information over the phone with representatives who understand their needs. Your dental clinic's reputation will improve — the word will spread.

Excellent customer service is key to increasing customer satisfaction and retention. Who doesn't want loyal customers? Call tracking and call analytics enable you to improve the patient experience from the first call.

Chapter 2

Why your dental office needs call tracking

Learn its importance and benefits

Importance and benefits of call tracking

Every dental practice wants new patients. But how much are they willing to invest in marketing to get them? And how can they measure the effectiveness of their marketing campaigns?

With more dentists offering higher-end services such as cosmetic dentistry or dental implants, clinics face intense competition for acquiring new patients. These days, it's impossible to attract new prospects by spending just the bare minimum for a new patient lead.

To compete within the industry, sophisticated multi-channel marketing campaigns must promote your entire range of dental services. These campaigns are not cheap, and you want to ensure that your marketing dollars are well spent.

Especially for new dental clinics, allocating funds to marketing in their initial years of operation can be challenging. Yet without it, you might have a tough time attracting new patients to become a sustainable operation.

Dentists on top of their game invest in marketing their practice but also demand strong returns on investments for each dental marketing campaign they launch.

Call tracking helps dental practice owners refine their marketing approach by delivering insights about campaigns and high-performing channels that drive patients to schedule appointments. Campaign management is a crucial part of the game.
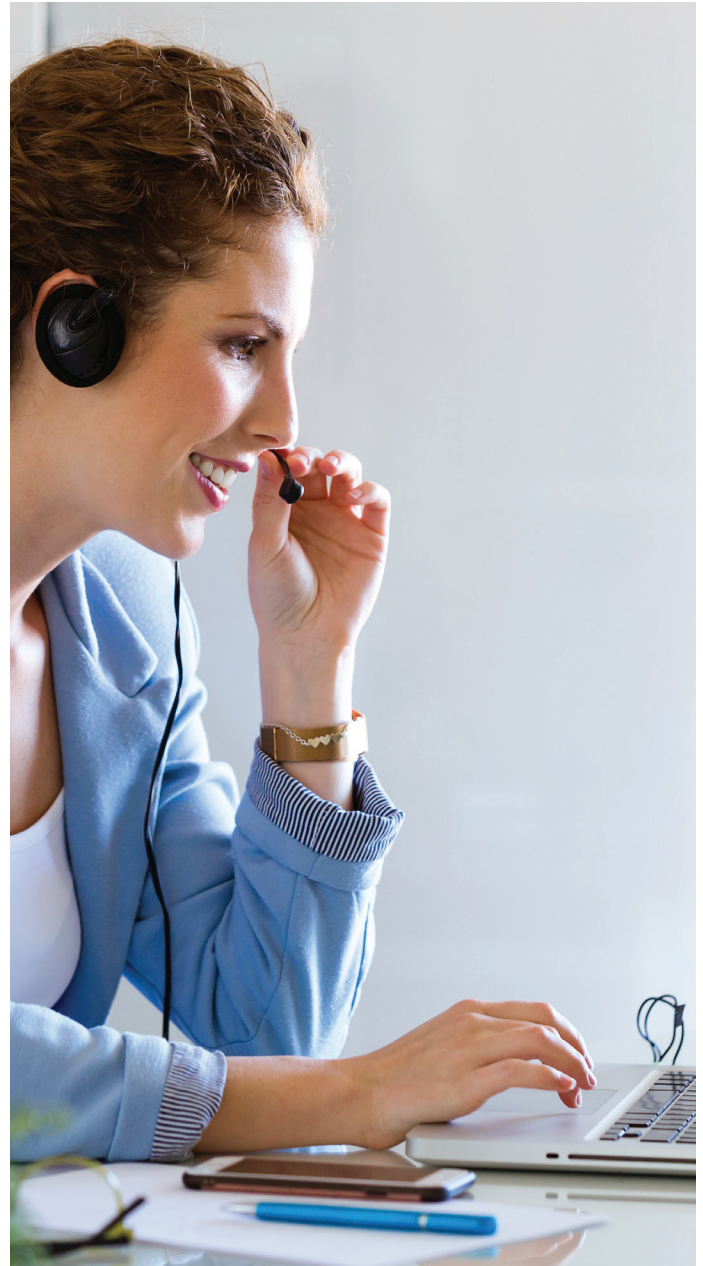
Call analytics helps dentists understand each phone call. Provided with conversational data, you can examine:

◊ Key terms your prospects are mentioning without listening to each call

◊ How well your staff is performing

◊ And how you can improve customer service to delight new patient leads over the phone

Without call tracking and analytics, it's mostly guesswork. It's impossible to know which marketing efforts are driving the best results. You can't make data-driven decisions to improve agent performance.

Here's a list of benefits that are game-changers for your dental marketing growth:

1. Recapture missed opportunities

With advanced call tracking and analytics, you know which callers didn't schedule an appointment and why (reasons not booked). Even better, you can give your team effective phrasing to win those leads back by understanding the caller's intent.

2. Measure performance of call centers vs. receptionists

With call tracking and analytics, you can assess call conversion rates across your different communication channels, spot trends, and make quick adjustments.

3. Optimize services and hours

Identify where you can expand your services based on critical call information such as keywords and hours of the day mentioned. Understand the needs of your community and serve them better.

4. Reduce missed calls

Have access to how many calls were not answered by a team member so you can adjust your staffing to match the call volume you receive daily.

5. Simplify auto-attendant greeting

Does it take too long for a caller to connect with a team member? Optimize your phone set-up and reduce hang-ups, dropped calls, and missed opportunities.

6. Measure marketing effectiveness

Call tracking shows you the number of new patient calls coming in from each type of marketing you do, which helps you know where to invest your marketing budget.

It helps you make data-backed, informed decisions on which marketing channels to invest in for better ROI. You'll also identify areas where your advertising strategies are inefficient. By identifying and focusing on campaigns that are driving the most calls to your practice, you'll eliminate unnecessary spending on ads that are not performing well.

7. Track the patient's journey

By integrating your call tracking software with your Google Ads account, you can tie results back to individual marketing campaigns right down to the search terms people typed to find your practice.

8. Spot trends easily

Aggregated call tracking data makes it easy to see trends — present that information to the executive team and other stakeholders. You can generate reports for individual offices, regions, brands, or the entire company.

9. Improve search engine optimization (SEO)

Call tracking platforms provide you with a great overall view of how your web pages and keywords are performing. With keyword-level tracking, you'll understand exactly which search terms and keywords trigger your customers to call.

The valuable call data allows you to refine your SEO strategy by focusing on keywords your customers are actively searching for on google search.

10. Delight prospects with a tailored customer experience

You'll gather valuable insights into customers' interactions with your business by tracking and recording phone calls. This information helps you understand the caller's intent and how well your team handles the calls. Improving customer experience is vital for business growth.

By analyzing the recorded calls, you'll know what your customers and agents said during the call. With these insights, you can provide prospects with a tailored customer experience that better accommodates their needs.

11. Manage staff performance and help them improve their skills

Not sure how well your team is performing over the phone? Recorded calls help you identify why your reps aren't able to close leads and book new patients.

Analyzing each team member's performance gives you a solid overview of who's performing best and who needs additional training, creating a culture of accountability for your team.

The ability to record calls and go through them gives you precious insight into the conversations between the prospects and your call representatives.

When your staff is well trained to handle conversations like experts, you'll see a significant bump in conversion rates and customer satisfaction.

Chapter 3

How does call tracking work?

What are the types of call tracking?

◊ Keyword-level tracking

◊ Source-level tracking

◊ Multi-channel attribution tracking

We've discussed the benefits and features, but how does call tracking work?

You start by using a trackable phone number. You can get attribution for your calls and understand their origin. Call tracking numbers should be unique and are used for specific marketing campaigns.

Usually, these unique phone numbers differ from your usual business number, so callers are associated with particular campaigns. When a specific campaign ends, you can repurpose the number for a new initiative.

Are you looking to test multiple campaigns at one time? Then, it's recommended to use dynamic number insertion (DNI), which lets you use various call tracking numbers across different campaigns.

The numbers can be utilized on many different platforms. Including them on:

◊ Your website

◊ Google ads

◊ Any other types of digital marketing channels

That allows your business to closely observe all your campaigns in real-time and track how they're performing, making improvements on the fly.

Sophisticated forms of call tracking allow you to quickly see which marketing channels and keywords deliver high-quality leads to your business.

# What are the types of call tracking?

As a result of the amount of [technology and information available today](#), the customer journey becomes less and less linear. The way customers interact with your organization becomes increasingly unpredictable.

Patients interact with your business in multiple ways. It's a challenge to piece all the customer touchpoints together and make coherent sense of them all.

Call tracking is a solution that has emerged to help bridge the gaps between businesses and customers. There are different types of call tracking services available — we'll review each type and their main differences, explore how they leverage information to fine-tune marketing efforts, enhance the customer experience, and drive customer traffic.

Type 1: Keyword-level tracking

Keyword-level tracking helps you determine which search terms drive the most traffic to your website and generate the most leads.
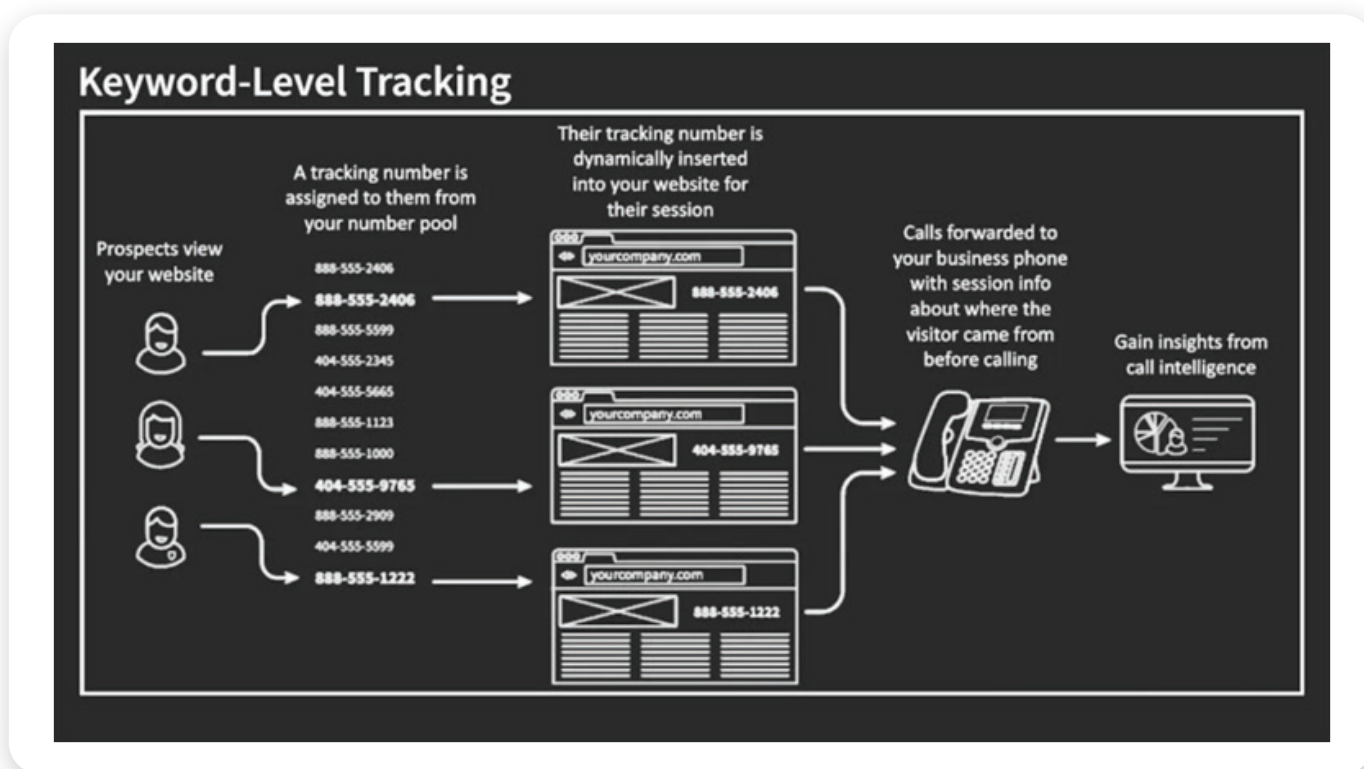

In a nutshell, keyword-level call tracking is a variety of phone numbers unique to your business. When customers search for a keyword and click on your ad, a dedicated phone number is assigned to them.

If the customer calls you using that number, you'll know the call source and which keyword drove that call.

By capturing data on which keywords are driving the most calls, you'll get actionable insights on how to optimize your search engine optimization (SEO) strategy for keywords that are high performing.

Type 2: Source-level tracking

Source-level tracking provides insight into which marketing campaigns are driving traffic and performing better, utilizing a unique phone number for each campaign you have.
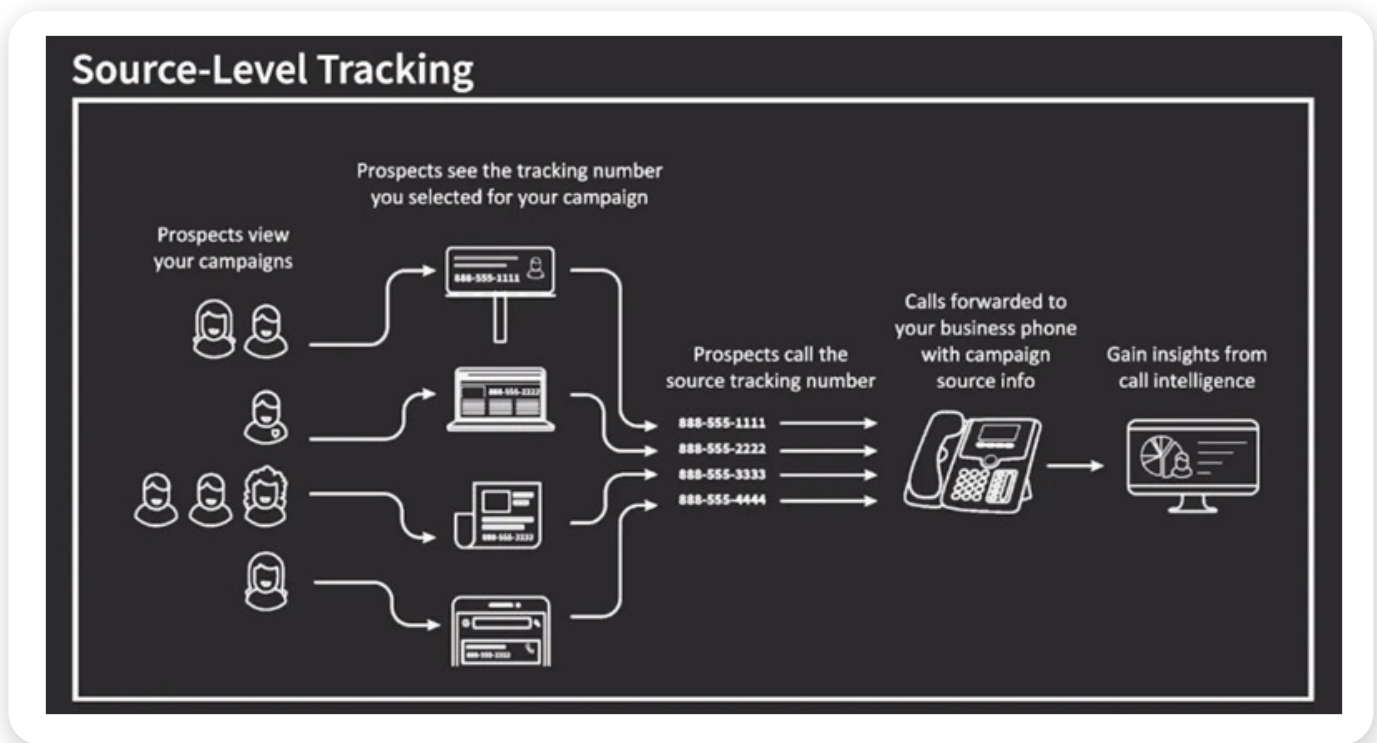
Source-level tracking lets you track offline and online campaigns by utilizing unique numbers for each campaign you want to follow closely.

When customers call from those specific tracking numbers, your call tracking software will automatically determine from which campaigns they are coming.

Source-level call tracking allows you to test which campaigns are performing best and generating the most leads. You can fine-tune your strategies and improve marketing ROI by validating your marketing efforts.

Type 3: Multi-channel attribution tracking

Multi-channel attribution tracking allows you to track your entire customers' journey from start to finish. You'll get a bird's-eye view of all the customer interactions that lead to conversions.
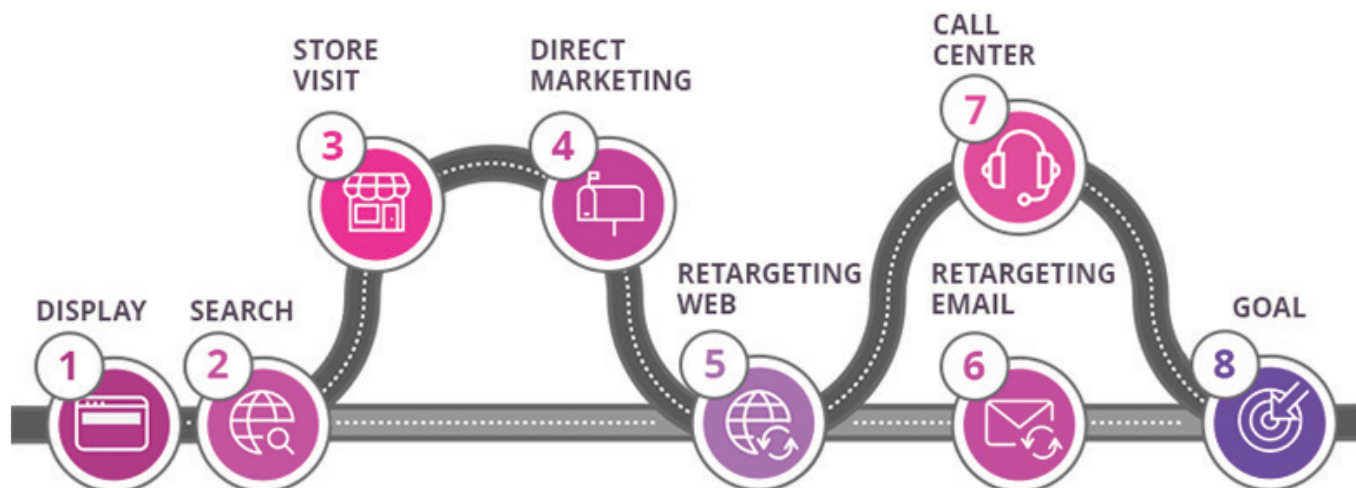
Picture this scenario. A prospect clicks into one of your Google PPC ads. They browse your website for a while and then leave. After a couple of days, they decide to revisit your website through an organic search (googling your business name).

Again, they exit your website without converting. After that, they'll return to one of your pages through a retargeting ad you're running.

When using multi-channel attribution, you can view the entire customer journey your prospects are going through. For example:

◊   Google ads

◊   Organic search

◊   Retargeted ad

Collecting this data helps measure which marketing campaigns are driving the most traffic and converting at a higher rate.

By understanding the initial and final customer touchpoints, you'll have great insights into what digital channels are worth investing in, allowing you to optimize your marketing strategies and make good use of your marketing dollars.
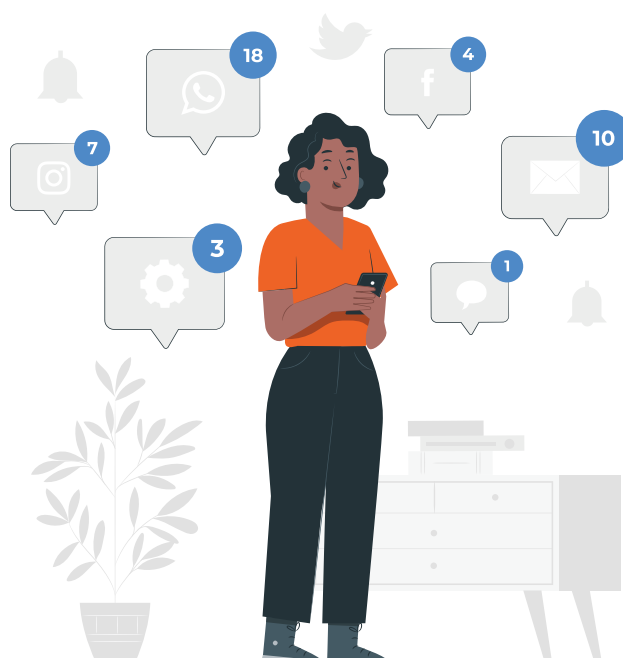
Chapter 4
Call analytics

Learn the most important metrics and how to measure effectiveness

Call tracking provides important information that can give you essential insights to optimize your business processes. Once your call tracking software is set up and integrated, the system will begin collecting data as phone calls start. You'll need to examine the data gathered and review the reports to make the most of your investment.

Here's a list of some of the most valuable metrics you should pay attention to:

◊   Total number of incoming calls

◊   Time of the day

◊   Number of calls from new patients

◊   Number of calls from your existing patients

◊   Number of calls that lead to booked appointments

◊   The date and time of each booked appointment

◊   Which services each caller wanted

◊   Landing page performance

◊   Call duration

◊   The marketing driver for each phone call

◊   Number of new patient calls that did not lead to an appointment

◊   The reason why a new patient call did not result in a booked appointment

◊   The lost revenue associated with the non-booked call or missed opportunity

◊   Whether somebody in your office followed up on the missed opportunity so the caller's concerns could be addressed and whether that follow-up call resulted in an appointment
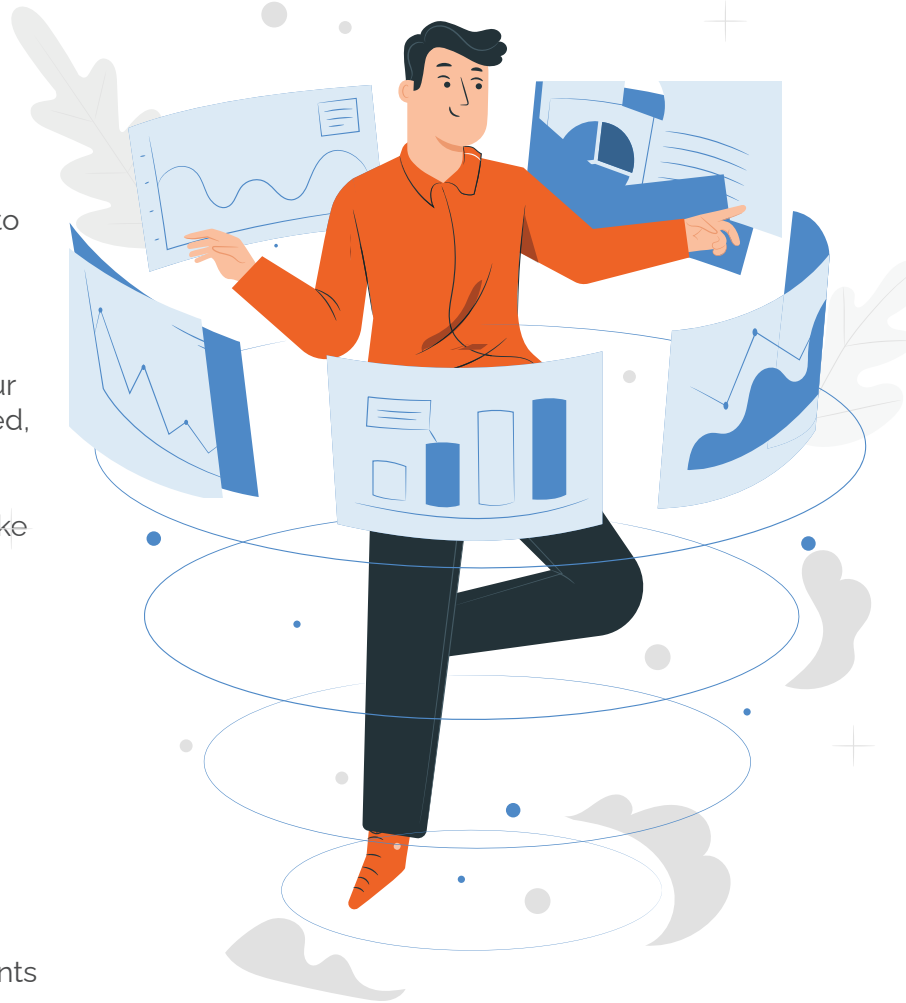
The best call tracking software for dental offices provides you the information you need to recoup missed opportunities and re-engage the caller. By converting more callers into booked appointments, you increase your revenue.

You spend money on advertising to make your phones ring. With the right call tracking service, you'll know how well that investment is or is not working.

You'll know how many calls are coming in and what services callers request. You'll know whether they book an appointment. And if they don't book, you'll see the reason for the missed opportunity.

A team member can call the person back to address their concerns. They can try to book the lost appointment.

Recapturing lost opportunities means you:

◊   Maximize your leads

◊   Increase the number of new dental patients you see in your office

◊   Increase revenue without increasing your advertising

◊   Reduce your new patient cost of acquisition

Chapter 5

Why do companies undervalue call tracking metrics?

Call tracking helps your dental practice grow. Validating marketing efforts, understanding the caller's intent, tracking the performance of your staff, and more.

Yet, many dental practices don't pay attention to call tracking metrics and analytics. Why does that happen?

Perception. Some individuals might perceive phone calls as old-fashioned in today's technology and information era. So there's a tendency to focus mainly on other online metrics such as click-rates and website heatmaps.

Still, phone calls are the most crucial method of converting leads into booked appointments, so why not invest in tracking, analyzing, and understanding what goes on in your calls?

Additionally, there's a chance companies focus only on some call metrics, forgetting others that are equally as important. For example, paying attention only to call volume instead of call sources.

The surge in the number of calls might seem great initially, but not knowing what caused the spike can be problematic.

If an office makes wrong assumptions based on guesswork instead of analyzing call tracking metrics, they risk investing their marketing budget in the wrong marketing campaigns.

Chapter 6

What are the common mistakes when using call tracking?

◊ Over-focus on call volume

◊ Failing to optimize keywords

◊ Failing to train staff based on conversation analytics

While call tracking benefits your dental practice, we'll now talk about common mistakes companies make and share some tips to avoid them.

Over-focus on call volume

Simply put, quantity doesn't equal quality. Just because there's a massive influx of calls doesn't mean your campaigns are performing well. If the leads are not qualified and converting poorly, how good are they?

Focusing on quantity over quality might give you a false sense of success, which can encourage you to make poor marketing decisions. What's important is to drive qualified leads.

The solution is to filter your calls based on metrics that allow you to qualify and categorize them. It can be location, whether the calls are from new patients or not, and call duration.

This lets you qualify calls and select the important ones only when certain conditions are met. Identifying exactly how many quality calls, not only the total volume, will give actionable insight into how you're performing and ways to improve your customer experience.
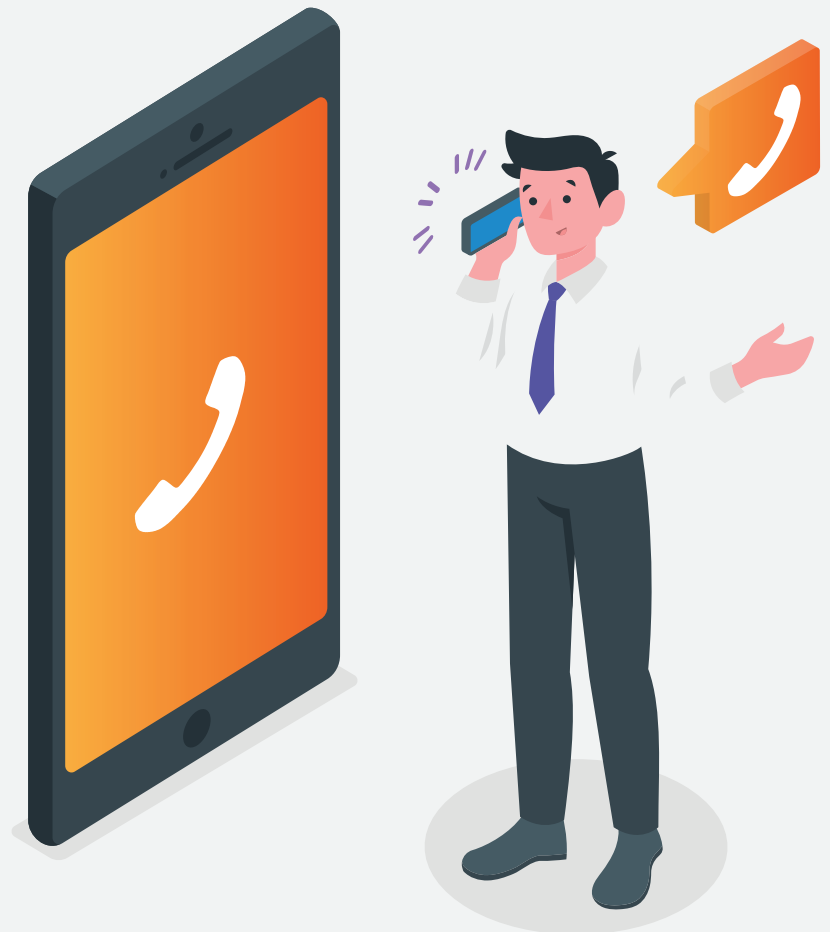
Failing to optimize keywords

To optimize your SEO campaigns, tracking which keywords are performing best and driving the most calls to your practice is vital.

Call tracking surfaces this critical information about keywords callers are looking for. What key terms are they entering in search engines directing them to your business?

Knowing what your prospects want allows you to adjust your marketing strategy, PPC ads, and train staff to answer all their questions over the phone.

Companies often fail to use this information to fine-tune their keyword targeting. By ranking poorly on search engines, you'll not get the visibility you want to get more qualified leads into your practice.

The solution is to implement keyword-level tracking in your ad campaigns. Collecting specific data on which keywords resonate best with your prospects will gather valuable insight, adjust your strategy accordingly, and yield better results.

Failing to train staff based on conversation analytics

The best call tracking software for dental practices also offers conversation analytics. By recording, transcribing, and analyzing calls for you, there's a plethora of information available to train your team and make them better at handling calls.

Yet, many practices use call tracking platforms that don't offer such functionalities. Or they might have it and not make wise use of the information.

The solution is to make sure you have these insights available in the call tracking platform you use. And when you do, make sure to go through calls (manually or with automated reports) to analyze your representatives' performance.

By knowing who performs best and who needs additional training, you can enhance the performance of your entire team, creating a culture of accountability and providing them with actionable insights on how to improve their performance over the phone.

Chapter 7
What is Patient Prism?

Patient Prism dental call tracking software enables dental practices to monitor their inbound calls and respond to them in a timely manner to increase patient acquisition, convert marketing leads into scheduled appointments, and improve the overall dental patient experience.

Patient Prism's AI dental technology has helped dental practices and multi-location dental groups expand and grow.

As you read this article, we will cover various ways Patient Prism's AI technology can help your dental practice:

1. Lower the cost of new patient acquisition by maximizing lead conversion

2. Fill out your appointment schedule

3. Increase new patient revenue

4. Improve the performance of team members who answer your phones

5. Track metrics to make informed business decisions

Patient Prism is a patented call tracking and coaching program that uses artificial intelligence and live coaches to help you to turn potential dental patients into patients with booked appointments.

Your dental practice can use Patient Prism's AI-enhanced, Cloud-based dental software to monitor incoming calls, and the software gives dental practices the option to focus on specific types of phone calls for more targeted results.

There are features unique to this dental call tracking platform that can help your dental practice improve its efficiency. For example:

◊ Artificial intelligence (AI) assesses call voice recordings in real-time and reports what went right and what went wrong on each call. You won't need to listen to calls and coach your phone receptionists because the AI delivers coaching feedback automatically.

◊ Patient Prism alerts your team when calls are missed or fail to result in a booked appointment with the information they need to call back and re-engage the caller.

◊ Your Patient Prism dashboard displays patented CallViz graphic visualization of calls and easy-to-read reports for speedy review of what is happening on your phones.

Beyond the call volume and marketing attribution that other call tracking platforms report, Patient Prism reports a great many micrometrics and surfaces up actionable intelligence so you can solve problems and make informed staffing, marketing, and other business decisions.

Chapter 8

How does Patient Prism work?

◊   Call recordings

◊   Missed opportunity call alerts

◊   Robust reports of call tracking trends

Patient Prism delivers call-tracking data in nearly real time, so dental practices can improve lead conversion and solve problems fast. Patient Prism's AI bot evaluates call recordings and sends missed opportunity alerts with pertinent information for calling back and engaging the patient.

Call recordings

Patient Prism records new patient calls, and Patient Prism's artificial intelligence and call coaches come together in a powerful platform to analyze new patient conversations and tell you about them within minutes.

Patient Prism's patented CallViz technology uniquely displays each call so you can see where failure is occurring in a call and whether engagement ends without an appointment. Dental services mentioned during the call are tracked by the AI and displayed in a keyword cloud on the Patient Prism dashboard. Call data is immediately reported in the dashboard analytics.

Missed opportunity call alerts

Patient Prism sends out a call alert for phone calls that do not end with a booked appointment. At Patient Prism, we refer to these alerts as "RELOs" or "Re-engage Lost Opportunity Alerts."

The dental call tracking technology can assess a 10-minute call in less than a second, and send an alert containing helpful information in less than 12 minutes.

Each alert includes information about what occurred during the call, how to communicate better on subsequent calls, and what information can be provided in a "callback" follow-up call to re-engage the potential new dental patient.

Re-engaging callers with callbacks typically increases patient conversion by 25% to 30%. Consistent utilization of RELOs significantly increases the number of new patients and fuels high-value Restorative and Cosmetic production without your practice having to spend more on marketing.
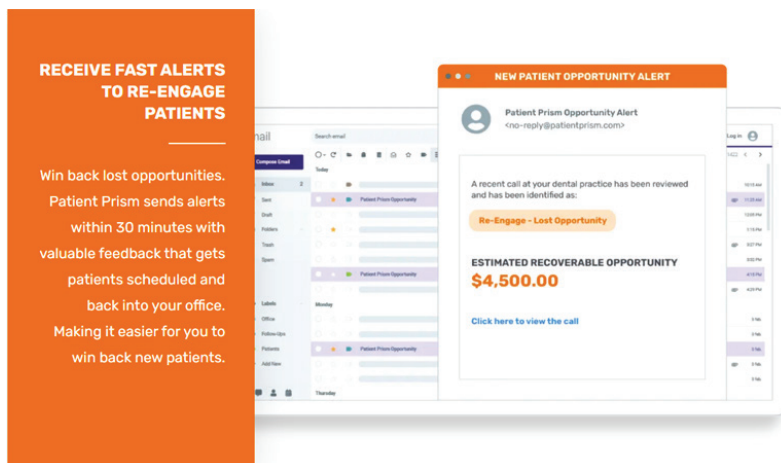
Robust reports of call tracking trends

With Patient Prism's dental call tracking, you can see the following caller tracker trends:

◊ Number of incoming calls

◊ Peak call days and hours

◊ Quality of phone calls

◊ Services requested

◊ Calls that ended in a booked appointment

◊ Re-engagement callback success

◊ Each employee's call conversion rate

◊ Reasons not booked, for example, no immediate open appointments

You can use the above caller tracker trends to further analyze how to improve your dental practice. With Patient Prism's analytics, you are better informed to initiate:

◊ Additional training

◊ Changes to advertising

◊ Expanding your receptionist team

◊ Changes in your schedule

◊ Adding an operatory and clinical team members

◊ Expanding your clinical services and hours

◊ Insurance participation
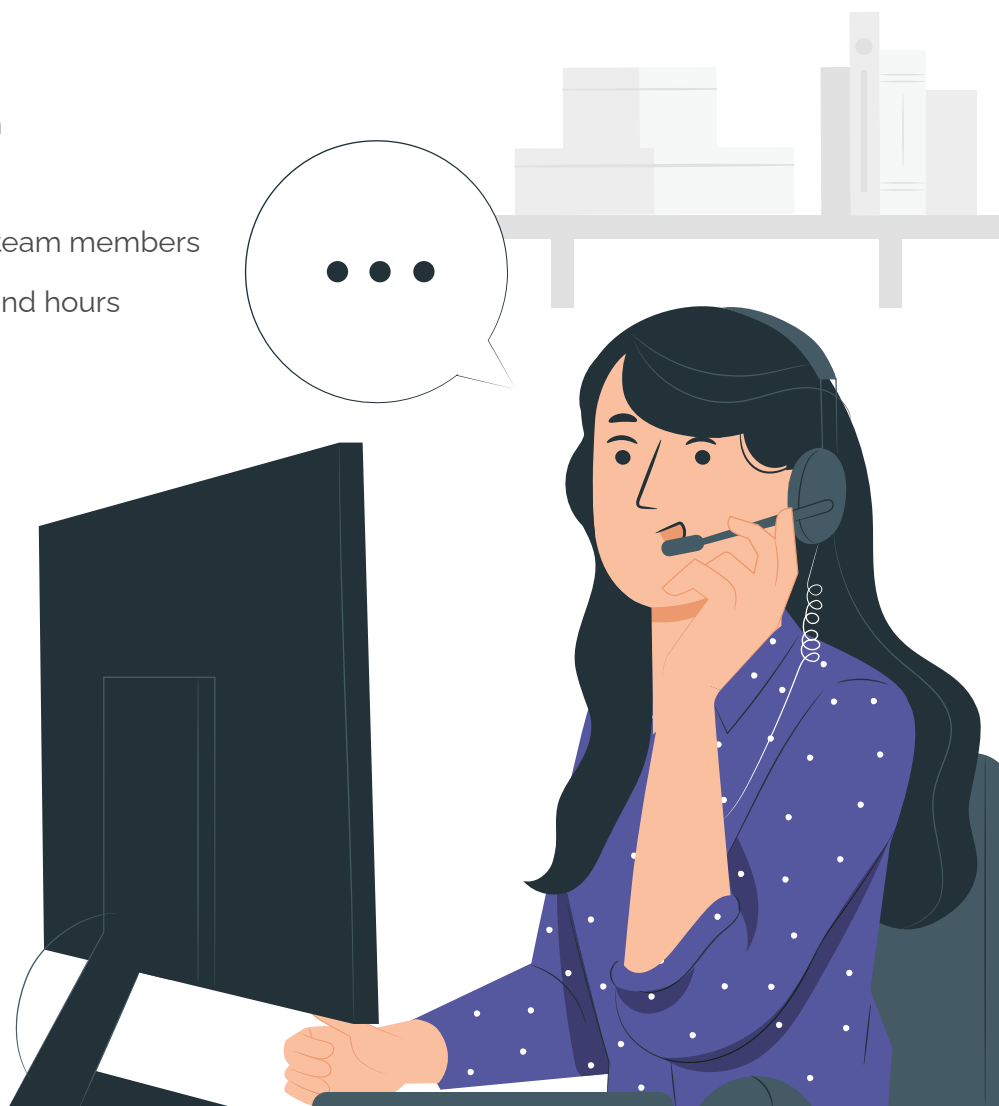
Chapter 9

Is Patient Prism's call tracking software HIPAA compliant?

Yes. Patient Prism has a set of features that maintains compliance with HIPAA and HITECH regulations while still leveraging the data coming from the phone calls.

Patient Prism's Health Insurance Portability and Accountability Act (HIPAA) compliant call tracking plans help dental practices and the marketing agencies serving them to maintain compliance with regulations set by HIPAA and HITECH.

Why is HIPAA compliant call tracking necessary?

Call tracking allows companies to track the sources of inbound phone calls, but it goes way deeper. It's a whole ecosystem that helps businesses improve their processes.

Patient Prism's dental call tracking helps practices, however large or small, to validate their marketing efforts, manage and improve the performance of their teams, enhance customer experience, and more.

That being said, healthcare providers must also protect the sensitive information collected from their patient calls.

Calls between healthcare providers and patients often involve discussing sensitive health information and medical history.

If you don't maintain HIPAA compliance, there is a risk for both the patients and the practices, being exposed to hefty fines and regulatory issues.

Chapter 10

How can dental call tracking software help your dental practice?

Patient Prism call tracking software can help dental practices and dentists in multiple ways.

Optimally staff your phones

Call analytics inform dental practices about peak call hours when they need to have calls answered live for lead conversion. For example, peak times could be at 9:00 am, midday, within minutes of their AdWords Ads posting, or even during evening hours. Solutions may vary from adding a phone line for overflow calls and having a staffer cross-trained to help answer the phones, having calls relayed to a receptionist's cell phone in the evenings, staggering staff lunch breaks, outsourcing overflow calls, and setting up a call center for multiple locations.
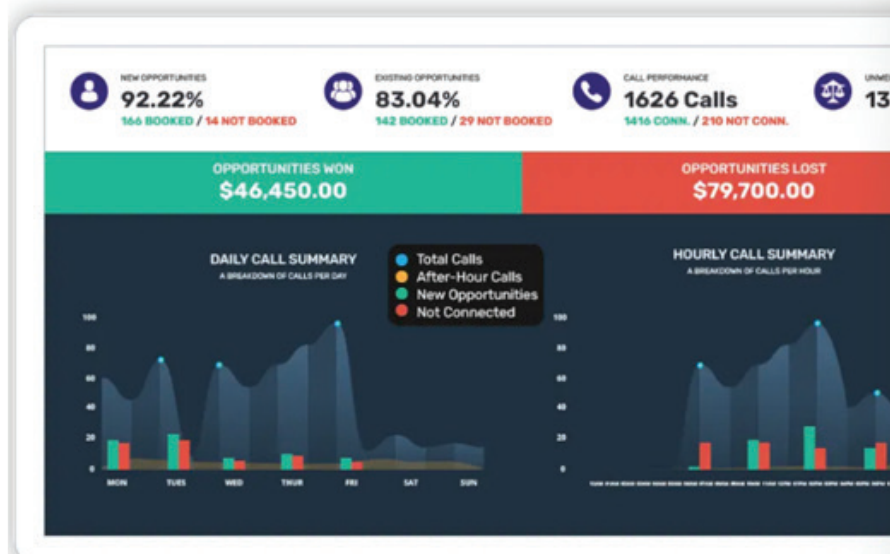
EFFECTIVELY TRACK YOUR PATIENT CALLS, PERFORMANCE, AND MARKETING

Real-time data shows call conversions, revenue opportunities, call volume by day and by hour, voicemails, hang-ups, reasons not booked, and how new patients are finding you.

Develop team members who answer your phones

Dental practices use Patient Prism to review individual dental receptionist's performance. You can see which members have a higher success rate with securing dental patients, and which members may need additional training for similar success. Patient Prism surfaces up the areas in which team members need development to become more successful in new patient conversion.

For example, Patient Prism reveals if a receptionist habitually does not offer information about your payment options or your in-house dental benefits plan. Patient Prism reveals if a receptionist has difficulty answering questions about insurance, dental implants, and other dental services and procedures. Patient Prism then helps by delivering coaching notes from our live coaches, and these notes include links to short training videos in Patient Prism Academy. These videos have been produced by many of the nation's top dental front office coaches.

GIVE YOUR STAFF THE TOOLS THEY NEED TO SUCCEED

Empower your team and recognize their efforts. Patient Prism does exactly that by coaching your staff on what to say when scheduling new patients. Boost your front desk's confidence with our built-in certificates of excellence and measure success by diving into our staff reports.

| Staff Member		Total	Booked	Not Booked	Converted	Fol. Up Conv.	Avg. Score	Total
Betsy Johnson		7 Calls	7 Calls	0 Calls	0 Calls	0 Calls	100	41 Calls
John Miller		11 Calls	11 Calls	1 Calls	0 Calls	0 Calls	97.43	1 Calls
Chad Bradley		18 Calls	18 Calls	1 Calls	0 Calls	0 Calls	97.43	1 Calls
Boone Baker		19 Calls	19 Calls	2 Calls	2 Calls	0 Calls	97.07	0 Calls
Mark Smith		17 Calls	17 Calls	1 Calls	0 Calls	0 Calls	97	0 Calls

Patient Prism clients use performance data to motivate learning and reward receptionists who are improving. Dental practice managers appreciate having performance metrics on which to base employee reviews, compensation, training, and role changes.

Significantly increase new patient conversion

On average, dental practices that use Patient Prism increase lead conversion by 25% to 30% within six months. Their phone receptionists develop confidence and competence quickly as:

◊ Their performance is monitored

◊ They receive automated coaching feedback

◊ Their successes are acknowledged
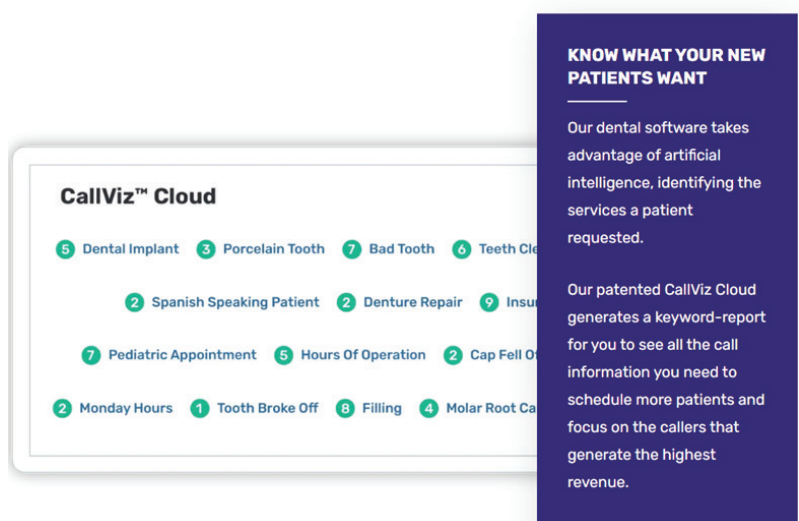
◊ Awareness rises for their contribution to the practice
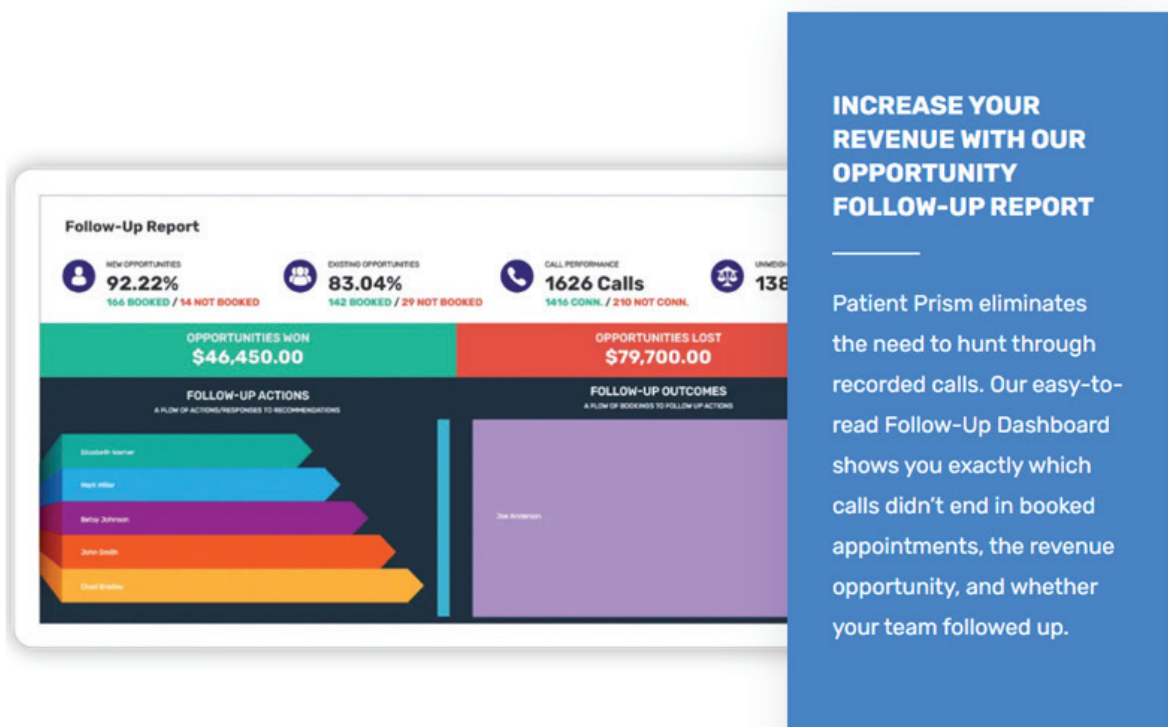
INCREASE YOUR REVENUE WITH OUR OPPORTUNITY FOLLOW-UP REPORT

Patient Prism eliminates the need to hunt through recorded calls. Our easy-to-read Follow-Up Dashboard shows you exactly which calls didn't end in booked appointments, the revenue opportunity, and whether your team followed up.

Follow-Up Report

New Opportunities	Existing Opportunities	Call Performance	
92.22%	83.04%	1626 Calls	138
166 BOOKED / 14 NOT BOOKED	142 BOOKED / 29 NOT BOOKED	1416 CONN. / 210 NOT CONN.	

OPPORTUNITIES WON	OPPORTUNITIES LOST
$46,450.00	$79,700.00

FOLLOW-UP ACTIONS
A FLOW OF ACTIONS/RESPONSES TO RECOMMENDATIONS

FOLLOW-UP OUTCOMES
A FLOW OF BOOKINGS TO FOLLOW UP ACTIONS

Fine tune your advertising

You can monitor your inbound calls to determine the number of leads each marketing campaign generated and the quality of those leads. You can test different offers and improve your message to target the patients you want. You can do more of the advertising that works best and eliminate advertising that is not producing the leads you want.

CallViz™ Cloud

5 Dental Implant   3 Porcelain Tooth   7 Bad Tooth   6 Teeth Cle

2 Spanish Speaking Patient   2 Denture Repair   9 Insu

7 Pediatric Appointment   5 Hours Of Operation   2 Cap Fell O

2 Monday Hours   1 Tooth Broke Off   8 Filling   4 Molar Root Ca

KNOW WHAT YOUR NEW PATIENTS WANT

Our dental software takes advantage of artificial intelligence, identifying the services a patient requested.

Our patented CallViz Cloud generates a keyword-report for you to see all the call information you need to schedule more patients and focus on the callers that generate the highest revenue.

Expand your services

Patient Prism tracks keywords related to dental services. By looking at the keyword CallViz Cloud on your dashboard, you readily see the services your inbound callers request.

This information can provide you with enough insight to offer new services to attract new patients to your dental practice. For example, you may decide to add clear aligner orthodontics or Saturday office hours.

Track won and lost revenue

Within Patient Prism, we can load the list of services you offer and your fee schedules. Based on the service(s) mentioned when a patient books an appointment, Patient Prism tracks the estimated revenue won in your Opportunities Won report. You have the ability to update the valuation when your dental practice receives actual revenue.

Based on the service(s) mentioned on the call, Patient Prism tracks estimated revenue lost when a patient declines to book an appointment. The estimated lost revenue is tracked in your Opportunities Lost report. If your team calls back and wins back that opportunity, you have the ability to change the lost revenue to won revenue.

Expand your dental organization

Patient Prism's dental call data can help you make business expansion decisions. For example, the measured demand for services, appointments, and insurance participation can help you decide to:

◊   Go in network with a specific dental plan

◊   Add an associate dentist

◊   Extend your hours of operation

◊   Add a nearby location to your DSO

Improve your patient experience

Trust is essential for patients to accept the care they need. Patient Prism usage optimizes the patient experience before the patient arrives and helps patients feel comfortable coming to your dental office. Patient Prism guides you in proper phone staffing so your practice minimizes on-hold calls. Patient Prism coaches your dental receptionists to:

◊   Treat callers like VIPs

◊   Make patients feel everyone there will genuinely care about them and care about what is in their best interest

◊   Build rapport with patients over the phone so they feel an immediate affinity with your team

◊   Clearly communicate they called the right place and you have the expertise to meet their needs

◊   Meet the caller's desire for a convenient appointment

◊   Tell the patient they look forward to seeing them, and the patient can call them with any questions and concerns.

Lower your patient acquisition costs

Do you know the patient acquisition cost for your dental practice? The patient acquisition cost metric is decisive for understanding your marketing budget. It also shows you where the opportunities are to increase your return on investment.

Patient acquisition cost (PAC) is the total cost of finding and acquiring a new patient. It is the amount of money required to reach someone and persuade them to become a patient of your dental practice. It is referred to as Customer Acquisition Cost (CAC) in other industries.
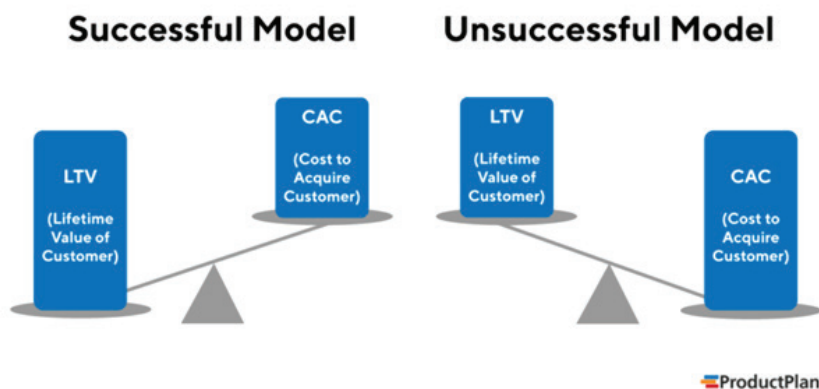
On average, marketers spend $2.62 per click on healthcare advertising in Google searches, but your total patient acquisition cost takes more into account than direct marketing spend. You'll consider staff salaries and taxes, tools, overhead costs including materials used in treatments, and more.

The ultimate goal is to increase a patient's lifetime value and reduce the cost of acquiring new patients. But how does call tracking help you with that?

When considering how to maximize profits, your ultimate goal should be to increase the margin between your patient acquisition cost and the lifetime value of that patient. The larger the margin of difference, the bigger your return on investment (ROI).

Dental call tracking can widen the margin in two ways:

◊   Reduce your patient acquisition cost by spending your marketing budget wisely

◊   Increase your patient lifetime value by retaining patients for longer

Chapter 11

What to look out for when choosing the right call tracking software

With so many call tracking providers offering the same basic functionalities, choosing one that fits your dental practice needs can be tricky. To bring you some light, we've listed some features to look out for when selecting dental call tracking software.

If you're driving yourself and your staff crazy trying to figure out how to grow your dental practice, it's time to focus on how many new patient calls your dental marketing efforts are generating and how many calls lead to booked appointments.

Good dental call tracking software provides actionable data so you can make intelligent business decisions.

The best call tracking companies give you the data in real-time. They notify you when a potential patient does not book. And they give your team the information they need to call back the patient and recapture the lost opportunity.

How do you know which call tracking provider is right for you? Here are some key factors to consider to help make your decision.

What does the software measure?

Not all dental call tracking systems measure the same things. You want to know how potential patients are finding your dental practice so you can judge the effectiveness of your marketing strategies. You want to understand why people are calling and what services they need.

You also need to know how many calls lead to booked appointments. And if they didn't book, why not?

Before you commit to a call tracking company, be sure it will provide the following data in real-time:

◊ Total number of incoming calls

◊ Number of calls from new patients

◊ Number of calls from your existing patients

◊ Number of calls that lead to booked appointments

◊ The date and time of each booked appointment

◊ Which services each caller wanted

◊ The marketing driver for each phone call

It's even more important to understand which calls from potential new patients did not lead to a booked appointment.

You should be able to see at a glance:

◊   The number of new patient calls that did not lead to an appointment

◊   The reason why a new patient call did not result in a booked appointment

◊   The lost revenue associated with the non-booked call or missed opportunity

◊   Whether somebody in your office followed up on the missed opportunity

The best call tracking software for dental offices provides the information necessary to win back missed opportunities and re-engage the prospects that failed to convert.

How will the call tracking system help improve the call conversion skills of your team?

A patient's first phone call to your office is likely to be their first impression of your professionalism. The best call tracking companies give dentists and practice managers the data they need to evaluate team members and phone systems.

As you are researching call tracking companies, ask if they provide this information:

◊   The name of the team member who answered the call

◊   Where that team member works – in the office or a call center

◊   The team member's success in building rapport with the caller

◊   The team member's call conversion rate (how many calls resulted in appointments)

◊   Just-in-time learning videos to give coaching tips to employees who missed an opportunity to book an appointment

◊   Information on calls that don't connect with a live person, for example, how many calls went to voicemail and how many callers left a message

If you have many calls going to voicemail, you may want to adjust schedules to have better phone coverage. Or it may help to add more phone lines.

Most call tracking companies provide basic data for each call. The best ones also include coaching videos and tips from top dental consultants. The coaching gives team members positive reinforcement and information they need to improve their phone skills and conversion rates.

That improvement increases the number of new patient appointments your dental office books. It also helps more people in your community receive the dental care they need. And it can help boost morale in your practice. Everyone likes to feel like they are contributing to the office's success.

How is the data presented?

You and your team are busy. You need the information from your service provider to be quickly accessible and easy to understand.

Ask the company about these criteria:

◊ How quickly will the office receive call data? Is it within the hour? Is it by the end of the day?

◊ Will team members get an email or text message alert when an opportunity arises to follow up with a missed opportunity?

◊ How is the call data displayed for a single dental practice?

◊ How is the call data displayed for multiple dental practices? What does the enterprise dashboard look like? Can you segment by region, brand, call center, and employee?

◊ Can you create custom reports?

◊ Can you export the data as a PDF or an Excel spreadsheet?

Here's a big question to ask, "Do you need to listen to each call to learn what happened? Or does the software give you a visual representation of the call, showing why the call did not convert and annotations so you can see essential caller data such as services desired?"

How accurate is the data?

Some call tracking services promise the moon. But when you start digging into the calls, you might find they were misclassified or they cited incorrect data. In some cases, the mistakes were made because the company is outsourcing the review process or is using flawed artificial intelligence algorithms.

Ask the service provider these key questions:

◊ What is the accuracy rate of the company's call tracking?

◊ Are the company's call coaches native English speakers?

◊ Does the company provide call coaches fluent in other languages such as Spanish?

◊ Do the call coaches have prior dental experience?

◊ Where is the company's call center located?

◊ Does the call tracking company audit its own call coaches for accuracy?

◊ Is the call center HIPAA compliant?
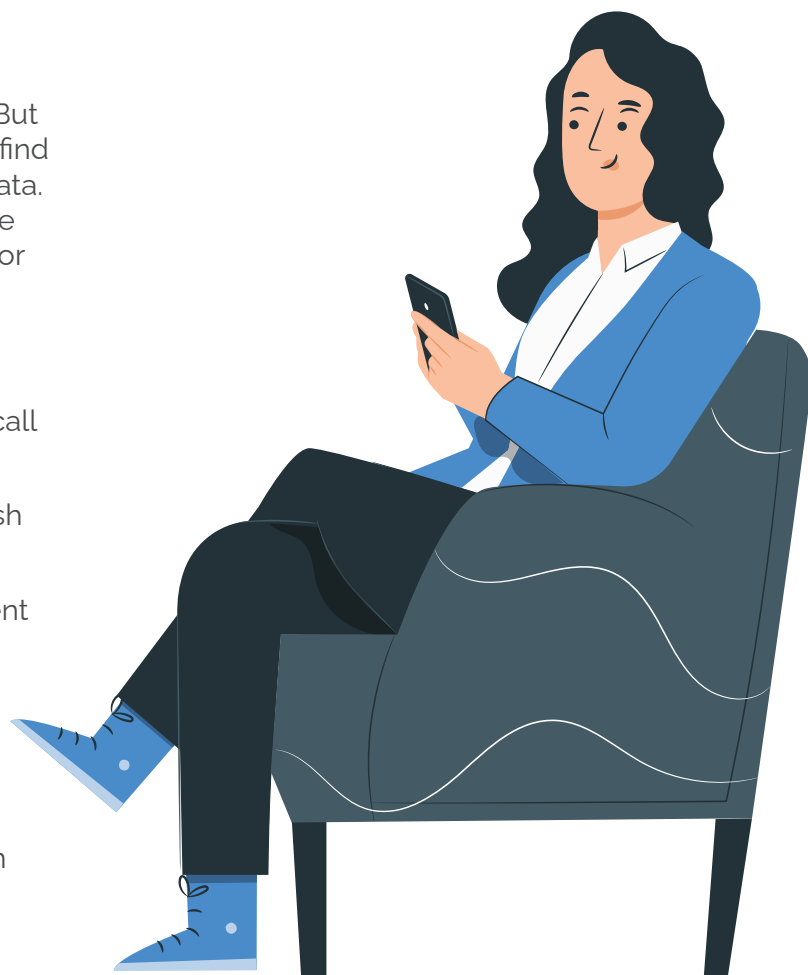
What measures are in place to ensure the call tracking software works at an optimal level?

It's important to ask if the company has triple redundancy. Will they confirm that you will have access anytime you want it? You don't want the system to crash.

Make sure to ask these essential questions:

◊　How long will they store call recordings and data to be accessible to your team?

◊　Does the company use its own patented technology, or has it simply white-labeled another company's technology?

◊　Is the company a Google Partner, and does it directly integrate with Adwords?

The latter lets the company share its conversion data by campaign and keyword within your Adwords account.

How easy is it to set up and use?

The ease of setting up and using the tracking system you've chosen is vital. The frustration of wasting unnecessary time on setting things up can be daunting. The faster you can get the software running the better. Time is money.

Luckily for you, Patient Prism provides your practice with Client Success Managers who are experts in the industry and provide a personalized onboarding experience through setup, training, and assurance that the platform is optimally used from the start.

How customizable is it?

Good call tracking solutions should offer customizable and flexible plans that fit your business budget and needs.

Dental practices of different sizes can all benefit from Patient Prism's call tracking and conversation intelligence solutions. So who can benefit from our product?

◊　Dentists & practice owners

◊　Managers

◊　Front offices

◊　Marketing agencies specializing in the dental industry

◊　DSOs

Getting to choose which features will benefit your organization the most is important, as each practice has different requirements.

What are the integrations available?

By integrating your call tracking software with other tools your business already has, you enhance your marketing channel ecosystem and provide customers with a robust framework for managing their entire operation.

Here are examples of integrations to look out for. Patient Prism can forward tracking numbers to any service.

◊ Weave
◊ Nextiva
◊ Mango
◊ RingCentral

◊ GoTo
◊ Vonage
◊ 8x8
◊ Intermedia

Each integration serves different purposes, and it's important for you to identify platforms your practice already uses to select the best dental call tracking solution that fits your needs.

How fast can you have access to call data?

It's never been more important for employees at all levels of an organization to have fast access to actionable data in order to make strategic, operational, and tactical decisions. It's a defining edge that companies can use to stay ahead of the competition.

Accessing data faster increases productivity and enables the business to respond to business requirements faster than before which translates into higher profits.

When it comes to call tracking, how fast can you access the call data to turn those insights into profits? Being able to quickly analyze calls from your phone conversations is vital to take action as soon as possible.

Knowing why a patient did not book and ways in which you can win that patient back within 20 minutes sounds good, right? Patient Prism provides you with lightning fast data and reports that allow you to re-engage with patients before they reach out to the competition.
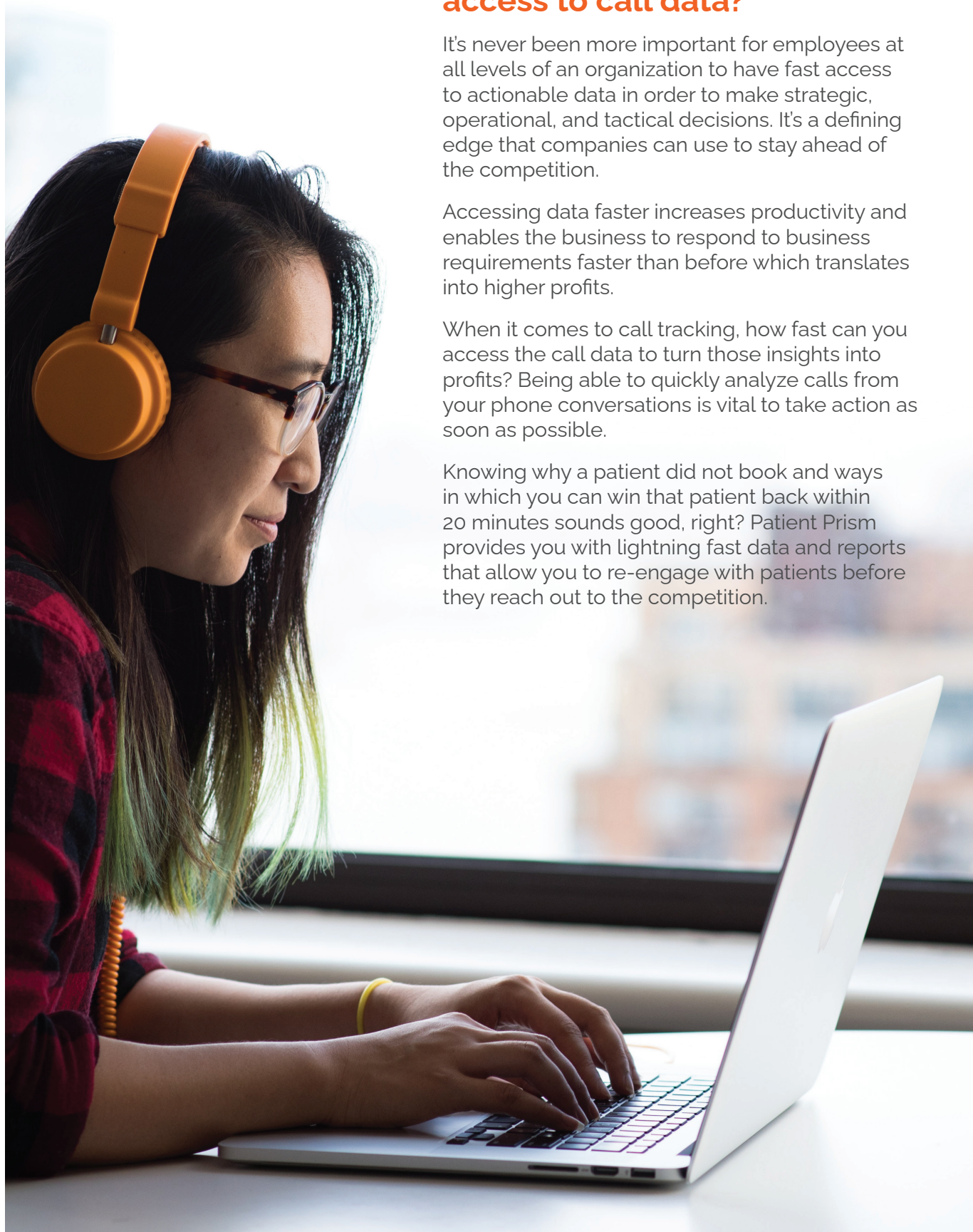
Chapter 12

Patient Prism dental call tracking software compared to others

Currently, there are eight leading call-tracking software platforms used by dental practices to help customers convert callers into booked dental patients:

◊ Patient Prism

◊ CallBox

◊ Call Rail

◊ Call Tracking Metrics

◊ Marchex

◊ Liine

◊ PeerLogic

◊ Invoca

When comparing them to determine which one you'll use in your dental practice or DSO, it's essential to understand their main features and differences.

Now, let's dive deep into these comparisons so you can make an informed decision to help your dental organization grow.

Comparison chart of the leading 8 call tracking platforms

◊ What features does each provide?

◊ Provision of call recordings

◊ Custom agent call routing

◊ Agent routing based on time conditions

◊ Custom auto attendants

◊ Personalized voicemail greetings

◊ Own VoIP system

◊ Staff report

◊ Call tracking line data - np

◊ Call tracking line data - ep

◊ Main line - multiple prompts

◊ Receptionist attribution

◊ Identified unhappy callers

◊ Spoken keywords

◊ Facial expression detection

◊ Provision of feedback on live calls

◊ Call transcription

◊ Spam call removal

◊ Missed opportunity call alerts

◊ Text messaging attribution

◊ Integration with Google and FaceBook analytics

◊ Map of keywords to call outcomes

◊ Upload of call outcome data to Google Ads, Bing, FaceBook

◊ Integration with HubSpot, SalesForce

◊ Call classification

◊ Toll free call tracking numbers

◊ Dynamic number insertion

How does Patient Prism's AI differentiate it from other call tracking programs?

Patient Prism uses its own dental call tracking process to ensure that dental businesses gain more patients. Compared to other dental call software, Patient Prism has unique advantages and features that can help your dental practice expand.

What's Included?

TRACK NEW-PATIENT CALLS
Patient Prism allows you to easily record and analyze all new patient calls.

RECEIVE FAST CALL FEEDBACK
Within 30 minutes of each call, understand what prevented the patient from being scheduled.

IDENTIFY HIGH-VALUE PATIENTS
Our software takes advantage of artificial intelligence, identifying the dollar value of your caller in real-time.

ANALYZE REVENUE OPPORTUNITIES
When new patient calls don't lead to appointments Patient Prism shows you how to win them over.

ANALYZE MARKETING INITIATIVES
Instantly spot which strategies produce the most revenue.

USER-FRIENDLY DASHBOARDS & DATA ANALYSIS
Quickly identify important metrics, without having to listen to calls.

COACH YOUR TEAM EFFECTIVELY
Through both, Patient Prism's personalized call-coaching and the Patient Prism Academy.

TRACK YOUR TEAM'S PERFORMANCE
Reward your top performers and provide instant training to struggling team members.

COMPLIMENTARY TUTORIALS & RESOURCES
All our customers receive exclusive access to resources provided by the dental industry's top experts.

RECEIVE PATIENT-CALL REPORTS AND MORE
View patient-call reports in real-time and receive daily summaries.

Patient Prism's artificial intelligence evaluates recordings of inbound calls in split seconds

As your dental business receives an inbound call, Patient Prism's artificial intelligence (AI) starts working. Your dental practice phone calls are quickly analyzed using artificial intelligence. The speed is remarkable. A ten-minute call is analyzed in 0.2 seconds.

The accuracy of the AI's interpretation of dental patient phone calls has been measured at 95%. This high level of accuracy is due to the bot's three years of intensive training from live call coaches as they have evaluated over 12,000,000 new dental patient calls.

Patient Prism's AI does the following with information from your inbound calls:

◊ The AI tracks whether the caller is an existing patient or a new patient from the keywords used in the inbound call.

◊ The AI identifies patient requests said in the phone call.

◊ If the call does not result in a booked appointment, the call recording is analyzed by the AI for 14 components of new patient conversation.

◊ The recording analysis results in a graphic visualization of the recording so your team member can listen to highlighted "good" and "bad" segments of the call for learning purposes.

◊ The AI automates coaching feedback that is reviewed by live call coaches before being relayed to you with a RELO alert, so you can make a follow-up call to the caller and make a second impression. Two years ago, RELO alerts were delivered within 30 minutes of the call. In June 2022, the alerts are typically delivered within 15 minutes, often faster.

◊ It links RELO alerts to short training videos, and sends phrasing to use in callbacks to convert new patients on an outgoing follow-up call.

◊ The AI updates the analytics dashboard in real time.

Patient Prism's AI call tracking software reliably comprehends and problem solves

Artificial intelligence is a field of computer programming, also known as machine learning (ML). This field focuses on developing intelligent computer systems that learn and comprehend.

An intelligent computer program is called a "bot" which is short for "robot." As bots process incoming information, they recognize patterns, and can make decisions with little or no human interface. As bots process information, they become smarter and faster in their decision making.

This learning is enabled by software that mimics the functioning of the human brain in processing information. Deep learning (DL) software applications enable machines (computers) to learn without human supervision as they recognize speech, translate languages, detect objects, interpret computer-vision images, and make data-driven decisions.

To make assessments, the bot relies on statistical techniques such as regression analysis. Each mathematical function (generative algorithm) in the software is like a human brain's neuron that takes action based on input.

Based on correlations the bot has identified in massive amounts of historical data and predictive analytics, the bot can forecast the predictability of certain outcomes.

Patient Prism uses natural language processing (NLP), which is a type of intelligent software. Patient Prism's bot recognizes phrases and words that commonly occur during dental phone calls.

As you receive calls from prospective dental patients, Patient Prism's natural language processing identifies the frequently used dental keywords and phrases. And as your dental receptionists receive more phone calls, the amount of keywords and phrases tracked will increase.

Your dental practice can use the insights from Patient Prism's caller tracker technology to make informed business decisions.

Patient Prism's natural language processing (NLP) is so advanced that Patient Prism's AI can interpret dental-related phone conversations with 95% accuracy, based on massive amounts of data from over 10 million dental phone calls to date.

Which of the 8 compared call tracking platforms are designed exclusively for dentistry?

Only Patient Prism and Peer Logic are designed exclusively for dental practices to improve new patient call conversion and track critical marketing, sales, and revenue performance indicators. The other call tracking platforms serve multiple industries.

What types of incoming leads do they monitor?

All eight platforms monitor incoming phone calls. For some types of businesses, website forms, text, and chat functions benefit customer engagement and conversion.

CallBox, CallRail, Call Tracking Metrics, Marchex, Liine, and Invoca have varying capabilities to track website form leads, inbound text leads, and website chat leads for additional fees. They have these add-on functions that Patient Prism does not because these companies serve diverse business industries.

Patient Prism and Peer Logic focus only on phone conversation data. In the case of dental practices, one-on-one voice conversations have the most significant impact on converting potential customers into booked patients.

Designed exclusively to optimize new dental patient acquisition, Patient Prism focuses on monitoring new patient calls and providing feedback from live call-coaching experts within 20 minutes of each new patient call.

With personalized coaching, Patient Prism clients become highly skilled in the art of new patient acquisition. The data and training provided allow your team to become call handling experts.

You can boost your conversions on calls and follow-ups using conversation intelligence. With Patient Prism's call tracking software, you can delight your prospects, re-engage lost opportunities, and convert high-value, new patient leads.

Patient Prism can monitor all types of incoming calls, not just new patient calls. Patient Prism's pricing allows dental practice managers to focus only on new patient calls or expand the service to include all incoming calls.

Do they all track marketing attribution?

Seven of the eight compared call tracking platforms track marketing attribution. Peer Logic does not. The seven call tracking platforms that track marketing attribution track the leads coming to phone numbers associated with individual advertising campaigns.

Which platforms automatically alert you to failed calls?

Both Patient Prism and CallBox alert their customers to new patient calls that result in failure to book an appointment. Both platforms send alerts via text and/or email. Patient Prism's alert system is the fastest.

Patient Prism pushes out dissatisfied call reports with actionable intelligence within 20 minutes. CallBox does this within an hour.

Patient Prism's alerts are uniquely designed to include the keywords mentioned during the call, what went well on the call, and call coaches' advice which will help your team on subsequent calls and help your team know what to say to win back that new patient with a callback call.

Which platforms track estimated won and lost revenue?

Patient Prism is the only one that estimates the amount of booked and lost revenue based on the specific fee schedule you supply. As your team makes callbacks that win the revenue opportunity, report metrics are updated.

Based on keywords tracked by AI and your fee schedule, Patient Prism alerts you to the estimated revenue you stand to gain if you win over that potential patient. Our fast alerts enable you to prioritize and call back the high-value treatment patients first.

What metrics are unique to Patient Prism?

In addition to tracking call volume throughout the day and weeks, the number of unanswered calls that went to voicemail or were hung up, the number of each type of call, and how many times specific dental services are mentioned, Patient Prism also tracks caller-specific information. This includes:

◊ The appointment status of individual callers (booked or not)

◊ Callback follow-up status

◊ Actual revenue recorded for individual patients

◊ Voice recording graphics identifying critical parts of the call to listen to and study

◊ Call coaching notes

Each receptionist's performance based on AI recognition of their voice

Patient Prism even awards printable certificates of achievement as your team members reach monthly conversion goals, creating a culture of positive accountability.

Here's a quote from one of our happy customers:

> There are several tools to help you improve your customer or patient interactions. I use the videos on the website for training our front desk staff. The recorded calls allow me to pinpoint what we are doing well as well as areas we can improve on. The breakdown of calls, by employee, allows me to apply accountability and celebrate achievements."
>
> **– Steven W., Front Office Manager**

What are the most distinguishing aspects of Patient Prism that dental practices appreciate?

Here are some unique aspects of Patient Prism that our clients love:

◊ Easy-to-use dashboards and custom reports that allow dental practice managers to track and understand what's going on with their practice

◊ Macro-level reports for the entire organization detailing the overall performance of your business and its processes efficiency

◊ Location-specific reports for multi-location groups and DSOs to understand which regions are performing best and which ones need improvements

◊ Call-center specific reports to manage the performance of your entire customer experience operation

◊ Micro-level reporting detailed to each individual phone call and team member, providing granular information on everything that's happened with the call

◊ Constant and personalized coaching feedback from dental consultants experts and links to hundreds of short training videos to help improve your team's performance

◊ Client Success Managers who are dental call experts and provide a personalized onboarding experience through setup, training, and assurance that the platform is optimally used from the start

◊ Custom pricing that scales to the size of your business needs

◊ Ability to listen to recorded phone calls or the AI-highlighted parts of calls to understand what happened and what can be improved

◊ RELO alerts with lightning-fast automatic reports that show opportunities lost and actionable insights on how to win them back

How does pricing compare?

Call tracking software is priced differently depending on the features and services provided.

When choosing a call tracking software, look at the features they provide and determine if they are able to provide solutions to your business needs.

The pricing structures of the eight platforms differ, so you will want to demo each product and converse with each company. Patient Prism, CallRail, and Call Tracking Metrics do not require the purchase of a perpetual license, whereas CallBox does.

With Patient Prism, you can stop your subscription when you like, although six months is the recommended period to see a significant increase in new patient revenue.

While our competitors charge a flat rate for all types of inbound calls, Patient Prism charges one price for new patient calls and a lower, nominal fee for all other tracked calls.

Patient Prism's rates include lower and customized pricing on an enterprise-scale of four or more practice locations.

Start with identifying the features of each platform and understand the benefits they can provide. Patient Prism subscription includes access to the entire platform, including all its call tracking, analytics, constant call coaching to improve team performance, and free access to our client success and technical support teams.

Check out what one of our happy customers has to say about our call tracking solution:

"Our offices have benefited from Patient Prism tremendously by having the ability to keep in touch with future patients. It was a smooth transition into Patient Prism and whenever we experience anything we have questions with support is always there for us." - Shannah Maldonado, Endodontic Associates (switched over from CallBox)
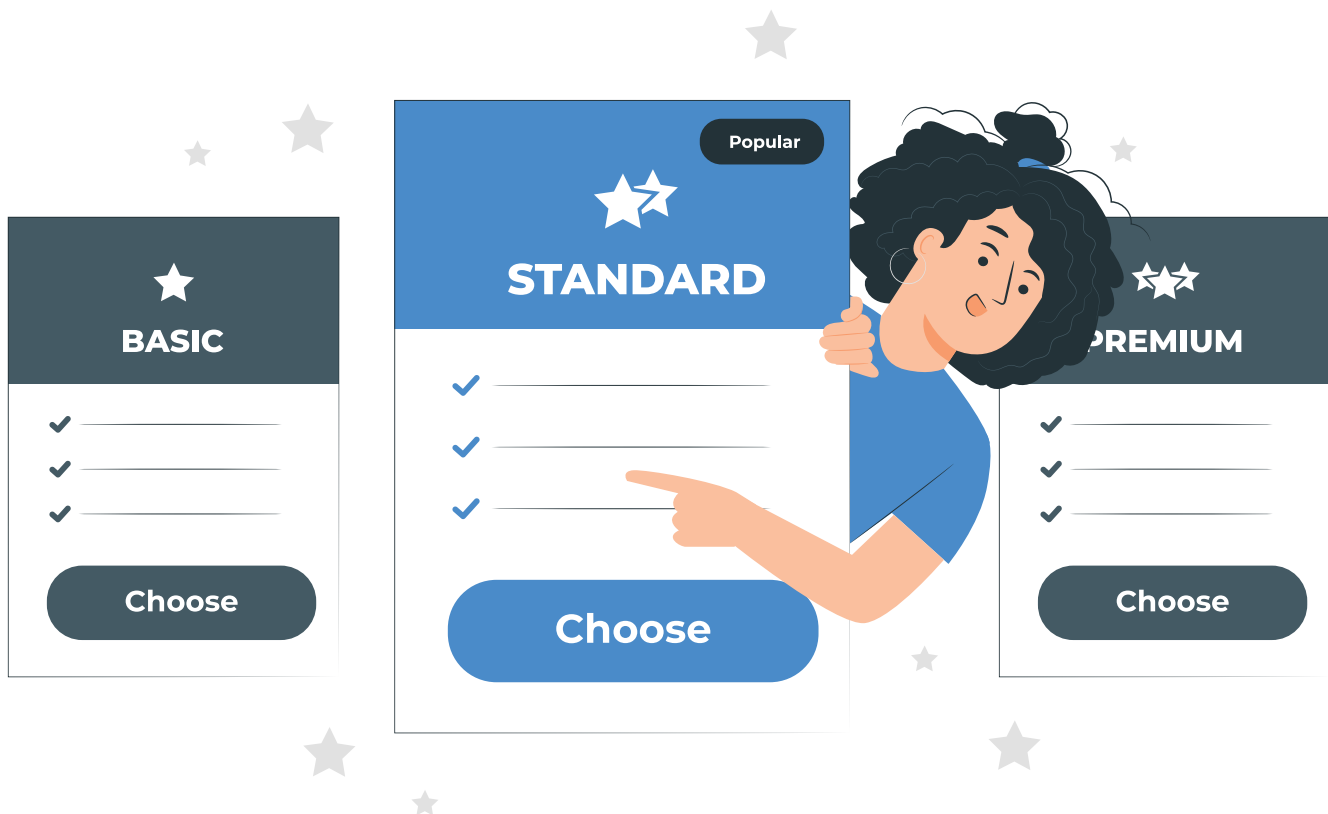
Do they all have a free trial period?

No = Invoca, Peer Logic, Marchex, CallBox, Patient Prism, Liine

Yes = Call Tracking Metrics, CallRail

Patient Prism does not offer a free trial month due to its concierge onboarding process.

To start, Patient Prism's client success coordinators work with each client to gather and enter the information our artificial intelligence needs to assess calls intelligently. This includes:

◊   Each client's custom list of services/procedures provided

◊   Custom fee schedule for revenue estimation

◊   In-network insurance providers

◊   Client preferences for alert thresholds

◊   Team member access to tracking reports

◊   Sample voice recordings (so the AI can track which receptionist is answering each call)

◊   Assignment of unlimited tracking numbers and relay phone lines

Then, personalized team training is provided via web conferencing on the day and time you schedule. Questions that come up during training and later are quickly answered by your assigned client success coordinator.

Our setup and training process results in faster optimal usage.

Chapter 13

What about ROI? Patient Prism case studies demonstrate Patient Prism dental call tracking produces significant results

Washington Smiles

In one of our case studies, we followed Washington Smiles, a dental practice with four doctors. Washington Smiles saw a 27% increase of new patients who booked appointments, from 65% to 92%.

In the case study, you will learn:

◊   How a dental team without the ability to track revenue opportunities can now track revenue. They could not track revenue opportunities. Now, they can track revenue opportunities for each phone call received.

◊   How multiple dentists can now review their dental receptionist team performance. They could not review individual team member performance. Now, they can see when their team achieves certain milestones, and they can also see individual team member's performance.

◊   How a dental practice with multiple doctors increased call conversions by almost 30%.

Dental Depot

In another case study, we followed Dental Depot, a family-owned dental group with 18 locations in Oklahoma, Texas, Arizona, and Missouri. In the case study you will learn that:

◊   Dental Depot was shocked to learn how many people called them and did not book an appointment.

◊   They have been pleased by Patient Prism showing them how to call back and win back new patients.

◊   In just six months, Dental Depot recovered $300,000 in revenue from patients who were won back on the follow-up call.

Lollipop Dental

In 2022, one of our new clients enjoyed substantial ROI from using Patient Prism. Lollipop Dental has nine pediatric dentists and five orthodontists providing pediatric dentistry and orthodontics in four locations south of Los Angeles—in Cerritos, Placentia, Garden Grove, and Costa Mesa, California.

Like most multi-location dental groups, they needed a solution that would quickly help them improve their call-handling success rate and provide the extensive call metrics they needed to motivate their call receptionists and solve problems.

Within the first 30 days of using Patient Prism, Lollipop dental converted 96% of incoming new patient callers. This high conversion rate was made possible by Patient Prism alerts to call back prospective patients. In that first month, they recovered $34,000 in new patient revenue that would have been lost had they not made the callbacks.

Smilepoint Dental Group

This privately owned dental group in the states of Texas and New Mexico is rapidly expanding and now has 28 locations. In order to scale Smilepoint, patient acquisition needs to be optimal across all communities Smilepoint serves.

Onboarding and training front office team members at a rapid pace requires efficiency in training them and in monitoring their performance so problems can be solved.

When Patient Prism was asked to assess their new patient acquisition, Smilepoint learned their new patient acquisition rate was 63%. The first problem to be solved was developing phone receptionists.

They needed to learn how to have the best conversations possible to convert callers into booked patients. They also needed the motivation to call back missed opportunities and win over those new patients.

Over the last two years, new patient acquisition has risen. In March of 2022, the new patient conversion was at 85%. Smilepoint's teams followed up with 99% of their RELOs in March, and in doing so, they recovered 138 new patients that initially said no. They also generated an additional $210,000 in estimated revenue in one month!

Smiles West

Smiles West has been acquiring dental practices at about a rate of two per year and in 2022 owns eight different brands and 22 locations around the greater Los Angeles area.

When SMC National invited Smile West to be a pilot client using Patient Prism, the initial goal was to provide the more robust call tracking data only Patient Prism's AI could provide. Patient Prism onboarded nine locations in October of 2021, and 19 of their locations are now live with Patient Prism.

In October of 2021, when they started, they were converting new patients at 84% but had over $52,000 in lost estimated revenue. In the first 5 months of having Patient Prism, 51 new patients were recovered from RELO alerts and generated over $162,000 in estimated revenue.