



Treatment Planned Follow-Up Guide (After 1st Appointment)

Goal: convert the treatment plan into a scheduled start using phone + text + email. Stop the sequence once scheduled.

Golden rules (do these every time)

- Lead with care: “Any questions after your visit?” before you talk logistics.
- Mirror the plan: reference the exact treatment they discussed (e.g., “the crown plan” / “cosmetic plan”).
- Make it easy: give 2 specific start options (day/time) and ask them to pick one.
- Multi-channel: call + text first; email is for a clean recap + links.
- Remove friction: offer to review insurance/financing and answer cost/timing questions on the spot.
- Every touch includes a clear next step (reply 1 or 2 / “Yes, hold it” / book via [link]).
- Log the outcome and schedule the next task before moving on.
- Call within 9-5 pm. Outside hours: send a text and call next business day.

Treatment planned follow-up cadence (until scheduled)

Contact & timing	Channel(s) (in order)	What to say (micro-script)	Goal / next step
1) 2 days after Post-visit	CALL TEXT (auto)	Call: Hi [Name], it's [Team] at Limitless Dental. Any questions on the plan? Want me to hold a start time: [Option A] or [Option B]? Text: Any questions on your plan? I can hold [Option A] or [Option B] for you - which works?	Book the next appointment (start / prep / consult). If no answer: voicemail + text, then schedule Contact #2.
2) 2 weeks after Call/text/email	CALL TEXT (auto) EMAIL (auto)	Call: Are you thinking this month or next month for [treatment]? I can hold a spot either way. Text: Reply 1) This month or 2) Next month for [treatment] and I'll hold a start time. Email: Subject: Next step for your [treatment] plan Hi [Name], quick recap: [1-line plan]. Reply 1) [Option A] or 2) [Option B], or book: [link]. Want a cost/financing review first? Reply “cost”.	Re-engage with an easy reply prompt and remove cost/timing friction. Next step: schedule start date OR schedule a 5-min benefits/financing call.
3) 1 month after Call + text	CALL TEXT (auto)	Call: Do you want to schedule [treatment], or pause for now? If schedule, I have [Option A] or [Option B]. Text: Ready to schedule [treatment]? Reply 1) [Option A] 2) [Option B] or “pause”.	Get a clear decision (schedule vs pause). If “pause”: ask permission to check back after their next hygiene visit and close the loop politely.



Contact & timing	Channel(s) (in order)	What to say (micro-script)	Goal / next step
4) 2 months after Call/text/email	CALL TEXT (auto) EMAIL (auto)	<p>Call: Last check-in for now, [Name]. If it's not the right time, totally fine and I'll pause outreach. If you'd like to start, I can reserve [Option A] or [Option B].</p> <p>Text: Last check-in for now: schedule your [treatment]? Reply 1) [Option A] 2) [Option B] or "not now".</p> <p>Email: Subject: Keeping your treatment plan on track</p> <p>Hi [Name], if you'd like to start [treatment], reply 1) [Option A] or 2) [Option B], or book: [link]. If now isn't the right time, reply "not now" and we'll pause outreach.</p>	Either schedule the start, or get an explicit "not now" so we can stop outreach and move to long-term nurture.
If NOT scheduled	Tag: TP - Not Now Quarterly text/email Revisit at next hygiene		Stay helpful long-term without high-frequency outreach.

When they respond (next step checklist)

- Confirm the best callback number + email.
- Confirm they're saying "yes" to which treatment (be specific).
- Offer 2 start-date options and schedule immediately (do not "call back later").
- If cost is the sticking point: offer a quick benefits/financing review and send the application/link while on the phone.
- Send confirmation text + email with date/time, what to expect, and any pre-visit instructions.
- Set your reminder/confirmation workflow per office policy.

Documentation standard: date/time, channel(s), outcome, and the next scheduled follow-up task.

