

SOLVEWORKS

AI Automation Proposal for **Dr. Mark Sutherland** Dentistry

Replace your \$400/mo MaxAssist spend with a platform that does 5× more.

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Executive Summary

You're already spending \$400/mo — let's make it work 5× harder

Your practice spends **\$400/month on MaxAssist** for text reminders, recall messaging, cancellation recovery, and waitlist management. Those are table-stakes features — and you're paying premium prices for them.

We'll replace everything MaxAssist does — and add capabilities it can't touch. AI phone answering that never misses a call. Treatment plan follow-up that recovers \$3–8K/month. Automated insurance verification. Review generation on autopilot. Real analytics that show you exactly what's working.

The average dental practice loses **\$150K–\$250K per year** to missed calls, no-shows, unscheduled treatment, and manual admin. MaxAssist addresses a sliver of that. SolveWorks addresses all of it — and your \$400/mo MaxAssist cost disappears on Day 1.

\$400

Monthly MaxAssist cost
eliminated on Day 1

\$8K+

Additional monthly
revenue recaptured

15hrs

Staff time saved
per week

** Estimates based on industry averages for general dental practices with 1,500+ active patients. Actual results may vary. MaxAssist cost savings are based on your current reported spend.*

MaxAssist vs SolveWorks

Everything you have now — plus everything you've been missing

WHAT YOU HAVE NOW

MaxAssist

\$400/month

- ✓ Text & email reminders
- ✓ Appointment confirmations
- ✓ Recall messaging
- ✓ Cancellation recovery
- ✓ Waitlist management
- ✓ VOIP phone system
- ✗ No AI phone answering
- ✗ No treatment plan follow-up
- ✗ No insurance verification
- ✗ No review automation
- ✗ No AI clinical notes
- ✗ No analytics dashboard
- ✗ No personalized AI outreach
- ✗ No 24/7 intelligent coverage

WHAT YOU COULD HAVE

SolveWorks

Starting at \$797/mo net new*

- ✓ AI-enhanced reminders & confirmations
- ✓ Smart recall & reactivation campaigns
- ✓ Intelligent cancellation recovery
- ✓ AI-powered waitlist management
- ✓ Phone system integration
- ✓ 24/7 AI Receptionist — zero missed calls
- ✓ Treatment plan follow-up sequences
- ✓ Automated insurance verification
- ✓ Review generation on autopilot
- ✓ AI Clinical Notes (voice-to-chart)
- ✓ Real-time analytics dashboard
- ✓ Personalized, intelligent outreach
- ✓ Books directly into your scheduler

* Net new cost calculated after eliminating your \$400/mo MaxAssist spend. Based on Starter package at \$1,197/mo.

5×
more capability

Same line item. Five times the impact.

You're already budgeted for patient communication software. SolveWorks consolidates that spend into a platform that doesn't just remind patients — it recovers revenue, answers phones, manages reputation, and gives you visibility into what's actually happening in your practice.

Proposed Solutions

Each solution works independently or as part of a complete package



Patient Engagement Hub

REPLACES MAXASSIST

\$599

Complete patient communication — reminders, recall, waitlist & more

/month

\$1,000 setup

Replaces everything MaxAssist does — enhanced with AI. Automated text and email reminders with one-tap confirm or reschedule. When a patient cancels, AI instantly contacts waitlisted patients to fill the slot. Smart recall identifies overdue patients and reaches out with personalized messaging. Reactivation campaigns for patients who've gone dark (6+ months). Phone system integration included.

Eliminates \$400/mo MaxAssist

Reduce no-shows by 40%+

Auto-fill cancellations

Smart waitlist

Reactivate 8-15% dormant patients

Automated hygiene recall



AI Receptionist & Call Handler

24/7 intelligent phone answering

\$799

/month

\$1,500 setup

An AI-powered phone agent that answers every call — before hours, after hours, during lunch, when lines are busy. Books appointments, answers common questions (hours, insurance accepted, location), transfers urgent calls to staff, and sends call summaries. This is the capability MaxAssist simply cannot offer.

Zero missed calls

24/7 availability

Books directly into your scheduler

Bilingual capable



Reputation & Review Automation

Automated Google review requests

\$299

/month

\$500 setup

After each appointment, patients receive a friendly text asking about their experience. Happy patients are guided to leave a Google review. Concerns are routed privately to your team before they become public. Builds your online presence on autopilot.

10-20 new reviews/month

Improved local SEO

Catch issues before public reviews

**Treatment Plan Follow-Up**

Automated outreach for unscheduled treatment

\$499

/month

\$1,000 setup

Patients who don't book after a treatment plan get personalized follow-up via text and email. AI addresses concerns and makes booking frictionless. The #1 revenue leak in dentistry — and MaxAssist doesn't touch it.

Recover \$3-8K/month in lost production

Personalized messaging

Non-pushy nurture sequences

**Insurance Verification Automation**

Pre-visit eligibility & benefits check

\$499

/month

\$1,000 setup

Verifies patient insurance 48 hours before their appointment. Pulls eligibility, remaining benefits, coverage details, and flags issues before arrival. No more phone hold times with insurance companies.

Save 5+ staff hours/week

Fewer billing surprises

Faster check-in

**AI Clinical Notes (Voice-to-Chart)**

Dictate during exams, AI writes the notes

\$699

/month

\$1,500 setup

Speak naturally during exams while AI generates structured clinical notes in real-time. Formatted for your PMS, includes dental codes, and can be reviewed before saving. Eliminates end-of-day charting.

Save 1-2 hours/day charting

Per provider pricing

Integrates with existing PMS

**Practice Analytics Dashboard**

Real-time KPIs & performance tracking

\$349

/month

\$1,000 setup

Custom dashboard showing production per provider, recall rates, treatment acceptance, new patient acquisition, and revenue trends. Weekly email reports and alerts when KPIs drop below targets.

Data-driven decisions

Weekly email reports

Custom KPI alerts

Recommended Packages

Every package replaces MaxAssist on Day 1 — your \$400/mo goes further

	RECOMMENDED	
STARTER	PROFESSIONAL	ENTERPRISE
\$1,197	\$1,995	\$2,995
/month	/month	/month
\$2,000 one-time setup	\$3,500 one-time setup	\$5,000 one-time setup
Net new cost: \$797/mo after MaxAssist savings	Net new cost: \$1,595/mo after MaxAssist savings	Net new cost: \$2,595/mo after MaxAssist savings
<ul style="list-style-type: none">✓ Patient Engagement Hub (replaces MaxAssist)✓ AI Receptionist & Call Handler✓ Reputation & Review Automation✓ Email & text support✓ Monthly performance report	<ul style="list-style-type: none">✓ Everything in Starter✓ Treatment Plan Follow-Up✓ Insurance Verification✓ Priority support✓ Weekly performance reports✓ Dedicated onboarding specialist	<ul style="list-style-type: none">✓ Everything in Professional✓ AI Clinical Notes✓ Practice Analytics Dashboard✓ Custom integrations✓ Dedicated account manager✓ Quarterly strategy sessions



60-Day Performance Guarantee

If you don't see measurable improvement within 60 days, we'll refund your entire setup fee. No questions asked. We succeed when you succeed.

All packages include MaxAssist replacement from Day 1 — cancel MaxAssist as soon as we go live.
Prices are monthly. Annual plans available at 15% discount.

Return on Investment

Conservative projections for the Professional package

REVENUE IMPACT (MONTHLY)	CONSERVATIVE EST.
Recovered production from treatment follow-up	\$3,000 – \$8,000
Revenue from reactivated patients (recall campaigns)	\$1,500 – \$3,000
Saved revenue from reduced no-shows & filled cancellations	\$2,000 – \$4,000
New patients captured via AI Receptionist (missed calls → booked)	\$1,500 – \$3,000
Staff time savings (15+ hrs/week @ blended rate)	\$1,200 – \$1,800
MaxAssist cost eliminated	+ \$400
Total Monthly Impact	\$9,600 – \$20,200

Professional Package Net Cost

\$1,595/mo

After \$400 MaxAssist savings

Conservative Monthly ROI

5–12×

Return on investment

Implementation Timeline

Zero disruption to patient care — we work around your schedule

- 1

WEEK 1

Discovery & MaxAssist Migration

Map workflows, connect to your PMS, migrate all MaxAssist functions. Configure AI to match your office's tone and protocols.
- 2

WEEK 2

Testing & Training

Run AI alongside your team. 30-minute staff training. Fine-tune responses. Verify all MaxAssist features are replicated.
- 3

WEEK 3

Go Live & Cancel MaxAssist

Full deployment with monitoring. Daily check-ins. Cancel MaxAssist — \$400/mo saved immediately.
- 4

ONGOING

Optimize & Scale

Monthly performance reviews, continuous AI training, and expansion recommendations based on results.

SOLVEWORKS

Ready to replace MaxAssist with something **5× better?**

Book a free 30-minute discovery call. We'll walk through the migration plan, show you exactly what changes on Day 1, and map the revenue you're leaving on the table.

Book Your Discovery Call →

calendly.com/brody1schofield/30min

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