

Growth Action Plan

BrightSmile Dental Group | AI

Lead: Dr. Ana Morales | Primary Goal: Save time with AI

Industry: Dental Clinics

Team Size: 18 staff across 3 clinics

Traffic/Users: ~9,500 monthly site visits; 420 monthly inbound calls

Expected first measurable gains: 2-6 weeks

1) Executive Summary

- Likely bottleneck: Manual intake and repetitive patient questions consume front-desk capacity.
- Fastest path: Deploy HIPAA-safe FAQ + triage assistant for web and SMS
- Expected impact: Reduce repetitive call load 20-30% (High confidence).
- Context: Front desk teams are overloaded with appointment questions, insurance checks, and rescheduling. Average first response is slow during peak hours.

2) Opportunity Diagnosis

- Primary: Manual intake and repetitive patient questions consume front-desk capacity.
- Secondary: No central workflow for after-hours inquiries and appointment triage.
- Assumption: Assumes current PMS supports API or secure webhook integration.

3) 30-60-90 Plan (Outcome-Based)

Window	Focus	Action	Impact	Confidence
0-30 days	AI Intake	Deploy HIPAA-safe FAQ + triage assistant for web and SMS	Reduce repetitive call load 20-30%	High confidence
31-60 days	Workflow	Automate insurance pre-check + appointment reminders	Save 8-12 staff hours/week	Medium confidence
61-90 days	Optimization	Route high-intent leads to live booking priority queue	Increase booked consults 10-15%	Medium confidence

4) Top 5 Priority Actions

1. Map top 25 repetitive patient questions and response rules.
2. Connect AI assistant to booking availability for real-time slot suggestions.
3. Automate no-show reactivation texts with personalized follow-up.
4. Trigger staff alerts only for high-value or exception scenarios.
5. Review weekly transcript quality and tighten prompts.

Projected KPI Direction (30/60/90)



5) Offer Recommendation + KPI Scorecard

Recommended: AI Automation (Primary), Landing Pages (Secondary). Track weekly: Hours saved/week, first-response time, booked consult rate.

6) Risks & Mitigation

- Risk: Compliance concerns. Mitigation: constrained prompts + human escalation.
- Risk: Staff adoption lag. Mitigation: 1-page SOP and role-based handoff rules.
- Risk: Integration delays. Mitigation: start with standalone assistant + phased integration.

7) Immediate Next Step

Run a 45-minute workflow audit of intake/rescheduling and select one automation path to ship this week.

"If useful, I can turn this into a hands-on execution sprint with milestones, owners, and delivery dates."

Book a strategy call: <https://nexgen.studio/#contact>

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