



Unleashing the Human X-Factor

Revolutionizing Dentistry
through People-First AI



Patient Prism provides **impactful AI capabilities** that help our supported practices connect with new patients. Throughout the course of our partnership, Patient Prism has ensured that their technology is successfully operationalized, **yielding the highest results** for our supported doctors.

PATRICK C. BAUER CEO, HEARTLAND DENTAL



Patient Prism is one of our highest return on investment technology partners. It enables our DSO to **consistently boost our new patient appointments by 15% or more**, at a fraction of the cost it would take to generate similar results by putting more spend into advertising.

A.J. PEAK CEO, PEAK DENTAL SERVICES



Patient Prism's AI provides crucial insights for scalable growth. After experiencing its impact, we expanded its use across Southeast locations. Our regional directors monitor vital KPIs for growth and we can make decisions to quickly resolve problems increasing patient flow.

MYLES MCALLISTER COO, SGA DENTAL PARTNERS



For sellers and buyers in the dental practice market, Patient Prism's Patient Diligence is a must-have tool. It's like a trusted compass for sellers, helping them navigate the transition process smoothly. And for buyers, it's like a reliable magnifying glass, uncovering hidden opportunities. With PatientPrism, both parties can confidently achieve success in dental practice transitions.

BRIAN COLAO MEMBER/DIRECTOR | DSO INDUSTRY GROUP AT DYKEMA

What is Patient Prism?

Ignite new patient acquisition leveraging Patient Prism, the world's most advanced healthcare AI platform. With AI powered lead tracking and analytics, your inbound and outbound interactions are tracked, measured, and summarized into actionable insights to boost your revenue.

See what's really happening

REAL-TIME DATA DELIVERY: Seize opportunities before the patient has moved on.

Analyze phone calls within one minute of the call completion so you can take immediate action on missed opportunities, cancellations, and more — revolutionizing practice management.

Re-engage patients instantly with SMS and nurture those high-value missed calls with text messages. Prevent patients from calling your competition.

Capitalize on your marketing ROI with real time appointment valuations and detailed ad analytics using our AI intelligence.

Integrate seamlessly with your business intelligence dashboards and CRMs with our powerful APIs and webhooks.

ACCELERATE GROWTH »



HOW DOES IT WORK?



PATIENT CONNECTS

Patient Prism records the interactions.



LEAD VALUE DETERMINED

AI analyzes the conversation, pinpoints the reason for it and the revenue opportunity.



DEEPLENS ANALYSIS

Leads are reviewed and analyzed, and recommendations are made to provide actionable insights.



FOLLOW UP ALERTS

Alerts are surfaced through email, text, or live dashboards within 1 minute of the lead capture.



CALL BACK

Team member uses the recommendations to re-engage and win back the patient.



REVENUE RECOVERED

Turn what had been a missed opportunity into a booked appointment.

DeepLens Analysis

The patient attempted to schedule an appointment to have **wisdom teeth extracted** but was informed that before the appointment can be scheduled, the patient must fill out paperwork. The agent provided the patient the necessary information...

Opportunities

New Patient \$500

Wisdom Teeth Extraction \$2,800

Topics

Oral Surgery (1)

Wisdom Teeth

Insurance (2)

PPO Insurance

Money (1)

I don't have insurance

Availability (2)

AM Afternoon



Booking Boss

Book 25 follow-ups

9 of 25 completed

Gamify Patient Conversions for Your Team with Our Achievement System

Effortlessly track and celebrate your team members' accomplishments as they earn badges. This system allows you to reward positive behaviors that contribute to practice growth, such as improving call answering rates, completing follow-up calls, and successfully booking appointments.

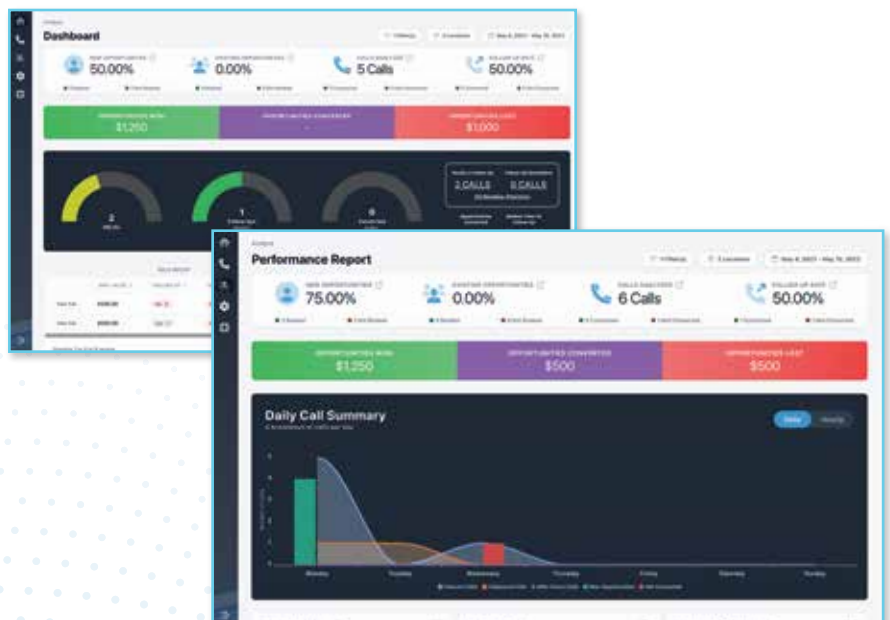
20 million calls

After analyzing more than 20 million phone calls over the course of almost 7 years, DeepLens is taking the guesswork out of patient phone calls.

- » Instantaneous recommendations for your team to win back lost patients.
- » Real-time SMS nurturing for missed calls and opportunities.
- » Patient segmentation to triage and prioritize high-value patients.
- » Track revenue sources, outcomes, and recovered revenue.

Performance metrics » TAKE ACTION

Our fully customizable **Smart Dashboards** ensure that you won't feel lost or overwhelmed by data and key performance indicators. Patient Prism surfaces essential metrics for your practice, such as opportunity types, team performance, booking outcomes, cancellations, reasons for not booking and much more.

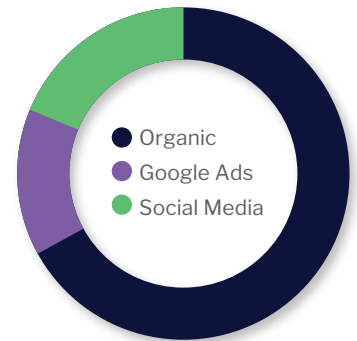


Manage Capacity & Marketing Budget

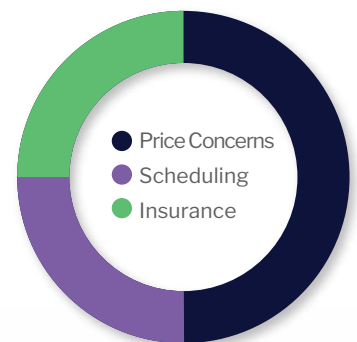
Do you need more new patients, or are you booking months out? With our reporting, you can see exactly what you need now and in the future.

- » Make data-driven decisions to optimize your marketing budget and maximize your returns.
- » Improve your new patient acquisition strategy with our enhanced Google Ads and Google Analytics 4 integrations.
- » Gain deeper insights into the ROI of your Google Ads campaigns, seeing which resulted in booked appointments.
- » Get the data you need, when you need it. Design your own KPIs and receive them automatically on a daily, weekly, or monthly basis.

Referring Source

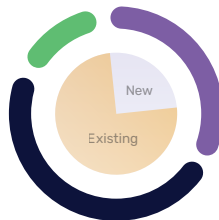
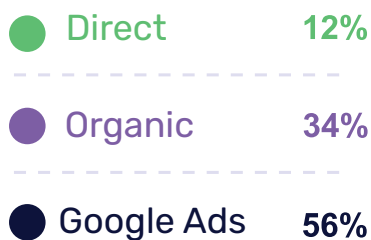


Reason Not Booked



AI-Powered Forms Integration Ensures No Lead is Left Behind!

Referring Source



Realize AI's Full Potential: Patient Prism System

Our new platform unleashes the full power of artificial intelligence, allowing you to build upon the features you already enjoy.

- A sleek, intuitive interface made for growing practices.
- Complete customization to tailor the software to your needs.
- Improved features to take your practice's performance to the next level!



ANALYZE

- Enterprise-First
- Customizable Reports
- Outbound Visibility
- Dictionaries
- Real-Time Alerts
- Agent Performance
- Micro-KPIs

AUTOMATE

- Deep Lens
- Marketing Integrations
- Voice Fingerprint
- SMS/Email Campaigns
- Multi-Channel Lead Capture
- Developer APIs
- Event Triggers
- Scheduled Exports

ACCELERATE

- Achievements
- Revenue Recovery
- High-Value Patients
- Capacity Optimization
- Training



Ignite Your Team's Performance with User Gamification and Achievement Badges!

Are you ready to take your team's performance to new heights?

Patient Prism's User Gamification and Achievement Badges offer a cutting-edge solution to motivate and inspire your employees towards exceptional results. Our innovative platform blends the excitement of gaming with the power of team collaboration, creating an environment where excellence is celebrated and rewarded.





COULD YOU BE THE NEXT DSO EXECUTIVE TO CHOOSE PATIENT PRISM?

SGA Dental Partners’ Myles McAllister chose Patient Prism and is glad he did.

Myles McAllister, Chief Operations Officer at SGA Dental Partners (SGA), chose the Patient Prism platform after being introduced to it at Dykema’s 9th Annual DSO Conference in July of 2022. His high praise for its utility—“It provides critical scalable insights for growth”—recently prompted an extensive interview with him.

“Patient Prism’s AI is capable of giving me the data I need to maximize our growth,” he said. “Once immersed in Patient Prism, my eyes were opened, and we decided to scale Patient Prism to other locations in the Southeast. Our regional directors use it to monitor critical KPIs that drive growth.”

**“
Only Patient Prism’s AI is capable of giving me the data I need to maximize our growth.”**

THE 3 CRITICAL KPIS

“There are three key Critical KPIs we monitor, coaching our teams to improve the patient experience. Based on performance and capacity data, we can make decisions to quickly resolve problems increasing patient flow,” said McAllister.

THE THREE KPIS ARE:

- 1 NUMBER OF UNANSWERED NEW PATIENT CALLS
- 2 NUMBER OF UNCONVERTED NEW PATIENT CALLS
- 3 THE AVERAGE NUMBER OF DAYS TO SCHEDULE

DILIGENCE WITH PATIENT PRISM PAYS OFF

SGA has been rapidly growing in the last 18 months. A Thurston Group portfolio company and premier dental service organization, it partnered with its 100th location in March of 2023, after experiencing unprecedented growth in 2022. As of July 2023, one year after onboarding with Patient Prism, SGA has grown from 1 to 111 locations throughout the Southeast.

“Practice growth is dependent on new patient acquisition, and that’s where Patient Prism comes in,” said McAllister. “Patient Prism’s ability to track the average number of days to schedule is essential for improving scheduling capacity and insight for de novo decisions. Our 2023 Service Level Agreements (SLAs) are to answer 85% or more of inbound calls, convert 85% or more new patient callers, and schedule 85% or more of these new patients within three days of when they call. We are on track to hit our goals by year-end with 2024 goals being 95%, 90%, and 90% respectively.”

INSIGHTS TO IMPROVE THE PATIENT EXPERIENCE

McAllister continued, “We Use Patient Prism to create a better patient experience. If you are not using Patient Prism, it becomes harder to gain the insight to do that. Because of Patient Prism, we know what is happening in each of our dental practices, can identify obstacles in the way of patient flow, and allow for quick action. It’s not just a case of telling a team they can improve. It’s also a case of management asking, ‘What do you need from us to be successful?’ Patient Prism highlights when we need to engage with the office team.”

PATIENT PRISM IS EASY TO USE

“Patient Prism is fully automated and presents data clearly with real-time updates. The Client Success team is personable, knowledgeable, and gets stuff done. In terms of timely onboarding, problem resolution, and ongoing support, Patient Prism is far better than all the other platform vendors I have worked with,” said McAllister.



Patient Prism is involved in everything we do, and is a central part of our operations. No other platform can deliver real-time alerts at scale to better serve patients.

Myles McAllister
COO OF SGA DENTAL PARTNERS



CASE STUDY



Discover How Dr. Costes Increased New Patient Conversions by 25%

In June of 2021, Mark Costes, DDS, Founder & CEO at Dental Success Institute, onboarded four of his Horizon Dental Group locations with Patient Prism. He had a clear goal of increasing the profitability of these locations. The key metric he knew he had to optimize was the rate of new patient acquisition while decreasing the CPA (cost per acquisition).

THE PROBLEM

Horizon Dental Group practices were working with lean teams during and coming out of the pandemic period. Their receptionists, already working at max capacity, didn't have time to make follow-up calls.

INITIAL METRICS

In June of 2021, starting metrics tracked by Patient Prism determined that new patient conversion was at 68%. That's better than most practices. Most practices miss 30% of inbound calls and convert less than 60%.

GETTING STARTED

When Horizon Dental Group receptionists made follow-up calls using the Patient Prism process in the first month, they were able to recover 3 patients, valued at a total of \$7,560. The ability of individual phone receptionists to convert qualified new-patient leads was 50% to 77% with some receptionists performing more conversions than others.

THE SOLUTION IDENTIFIED

As the months rolled on, Patient Prism's Client Success Manager, Almarie Burch, identified that the Horizon Dental Group had greater conversion potential if their receptionists were to call back more patients who did not book an appointment when they first made inquiries.

Almarie suggested the use of Call Force to make the follow-up calls on their behalf given the staff shortages. In June of 2022, new patient conversion had now increased to 69%, with 19% of follow-up calls by Call Force resulting in booked appointments.



THE FINAL RESULTS

In January 2023, new patient conversion had risen to 85%. Over the two-plus years of using Patient Prism in four locations, phone receptionists' sales skills increased significantly, and the Call Force agents who supplemented their efforts continued to deliver.

- » The estimated revenue recovered in the month of January 2023 equaled \$79,483.
- » 41 new patients were recovered using the Patient Prism follow-up process.
- » Individual receptionist's ability to convert qualified new patients ranged from 70%- 100%.



Lollipop Dental Earns Fast and Fabulous ROI with 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. They are dedicated to providing the same top-of-line care they would give their own kids and view each child as an extension of their own family.

THE PROBLEM

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.

THE SOLUTION

Lollipop Dental implemented Patient Prism in February of 2022. Patient Prism’s call tracking and call coaching platform utilizes artificial intelligence to assess every new patient phone call and identify who called, the ad-specific phone number relayed to their office, the dental services requested, the associated revenue opportunity, whether the caller scheduled—and if the caller did not schedule, the possible reasons based on elements of the conversation.

Every time a potential new patient ends the call without scheduling, Patient Prism quickly sends an alert back to the practice detailing the caller’s concerns and effective phrasing the team can use to call back and convert that patient. In response to these alerts, Lollipop team members could call back and attempt to schedule the new patients they wanted. The alerts and feedback help receptionists rapidly develop optimal conversational skills for engaging new patients.

In addition, Patient Prism tracks individual team member performance...the number of calls answered and converted to appointments...the number of opportunity alerts called and converted. And Patient Prism rewards receptionists with badges for hitting target percentages. Dr. Pham knows how each is performing and can now recognize them for their efforts and provide training to fill gaps in their conversational skills and knowledge.



THE IMMEDIATE RESULTS

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.

- » \$1,970 March 2022 Investment in Patient Prism
- » \$34,000 New Patient Revenue Recovered
- » 1,625% ROI in just one month

“ I have to say - and I don't blow smoke- Patient Prism has been one of the MOST impressive companies I've worked with in my entire career.

Dr. Peter Boulden
ATLANTA DENTAL SPA

“ Our office achieved a remarkable 92% appointment rate for new patients, ranking in the top 3% of all Patient Prism practices. We're extremely grateful for the exceptional team at Patient Prism as we continue to expand successful programs throughout Select Dental Management LLC.

Paul Gruensfelder
VP MARKETING, SELECT DENTAL MANAGEMENT

“ Patient Prism is a valuable tool to all dental offices! The training, support and guidance that Patient Prism offers is amazing! Almarie, Jillian, and the whole team go above and beyond to help! The opportunities to gain new patients using Patient Prism, the insights you gain and, training for employees are endless! We love Patient Prism.

Rebecca Bowling
DIRECTOR OF CUSTOMER EXPERIENCE, DENTAL DEPOT

“ Patient Prism is a game changer for dental marketing lead conversion and tracking. The information I get from them has helped us to bring in tens of thousands of dollars of previously lost revenue in a surprisingly small amount of time. I love them so much that when I changed jobs I had to have them signed up right away. I can't be nearly as successful without them and, Almarie is the best I've worked with! Seriously, if you want to grow your practice, Patient Prism is a no brainer.

Sherri Paxton
POSITIVE IMPACT DENTAL ALLIANCE

“ Patient Prism has been a valuable addition to our practice. It gives my manager and I real-time data on how well phones are being answered. It allows us to set target goals for our team and provides a software where they can track it. It pays for itself in the opportunity for our staff to listen to calls, see the shortcomings and then re-engage the potential patient. We have been able to re-activate many patients that did not schedule on the initial call.

Dr. TC Hardy
HARDY PEDIATRIC DENTISTRY & ORTHODONTICS



 patientprism.com

 sales@patientprism.com

 1-800-381-3638

» IGNITE PRACTICE GROWTH

