



# MY DENTAL PLAYBOOK

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## HOW TO BUILD SOPS FOR YOUR DENTAL PRACTICE

This document will help your dental practice(s) develop comprehensive SOPs to create a consistent and high-quality experience for every patient.

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# Defining Standard Operating Procedures

## What is an SOP?

1. A written document that provides step-by-step instructions for dental office tasks.
2. It ensures that every team member follows the same process, maintaining consistency and quality in patient care.

## The purpose of an SOP in a dental office

1. To create a standardized approach to routine tasks, helping the dental team deliver a seamless, efficient, and high-quality experience for every patient.
2. SOPs reduce errors, enhance communication, and ensure that best practices are followed across the office.

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## How to Build an SOP & Get Your Team Using It

### 1. Identify the key touchpoints in your patient journey

1. Start by mapping out the entire patient journey from initial contact to post-treatment follow-up.
2. Break down each step into specific interactions or touchpoints where your team engages with patients.

### 2. Define the objective of each SOP

1. Clearly state the purpose of the SOP.
2. Explain how it supports the patient journey and contributes to a positive patient experience.

### **3. Outline the steps & procedures**

1. Break down the process into detailed, step-by-step instructions.
2. Use clear and simple language to avoid any confusion.
3. Include any necessary scripts, templates, or checklists that the team should follow.

### **4. Assign roles & responsibilities**

1. Specify who is responsible for each step of the process.
2. Ensure that each team member understands their role in the patient journey.

### **5. Include best practices & tips**

1. Provide insights on how to handle common scenarios or challenges.
2. Include tips for enhancing patient satisfaction at each touchpoint.

### **6. Incorporate visual aids**

1. Use flowcharts, diagrams, or videos to illustrate processes.
2. Visual aids help clarify complex procedures and make the SOP more engaging.

### **7. Review & test the SOP**

1. Have team members review the SOP to ensure it is clear and practical.
2. Conduct a trial run to test the effectiveness of the SOP in real scenarios.

### **8. Implement training sessions**

1. Conduct training sessions to walk the team through the SOP.
2. Use role-playing or simulations to practice the procedures outlined in the SOP.

## 9. Monitor & update the SOP

1. Appoint and regularly monitor the effectiveness of the SOP.
2. Update the SOP as needed based on feedback and changes in procedures.

## 10. Encourage team buy-in

1. Communicate the importance of the SOP in delivering a consistent patient experience.
2. Encourage feedback and involve the team in the SOP development process to foster ownership and commitment.

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# Key SOPs to Consider Creating for Your Patient Journey

### Initial contact

Use for phone, chat, or online inquiries.

1. **Objective:** Ensure a warm, professional, and informative first impression.
2. **Key Procedures:** Greeting, information gathering, scheduling, answering FAQs, handling objections.

### Appointment scheduling & confirmation

1. **Objective:** Efficiently schedule appointments, reduce cancellations and no-shows, and ensure patients are informed and prepared.
2. **Key Procedures:** Scheduling, appointment confirmation, reminders, rescheduling/cancellations.

## New patient onboarding

1. **Objective:** Welcome and orient new patients to the practice.
2. **Key Procedures:** Registration, medical history intake, insurance verification, explaining the patient portal.

## Pre-appointment preparation

1. **Objective:** Prepare patients and staff for the upcoming appointment.
2. **Key Procedures:** Pre-appointment instructions, preparation of patient records, setting up treatment rooms.

## Patient check-in

1. **Objective:** Seamless and efficient check-in process.
2. **Key Procedures:** Greeting, verification of information, co-payment collection, waiting room management.

## Clinical interaction

1. **Objective:** Deliver exceptional care during the clinical visit.
2. **Key Procedures:** Patient handoff from team member to team member, explanation of procedures, addressing patient concerns, documentation.

## Treatment plan presentation

1. **Objective:** Clearly communicate the treatment plan and gain patient buy-in, consent, and acceptance.
2. **Key Procedures:** Treatment plan discussion, financial consultation, scheduling follow-up appointments.

## Payment processing

1. **Objective:** Ensure accurate and efficient billing and payment processing.
2. **Key Procedures:** Explanation of charges, insurance claims submission, payment collection, setting up payment plans.

## Post-treatment follow-up

1. **Objective:** Maintain patient engagement and satisfaction after treatment.
2. **Key Procedures:** Post-treatment instructions, follow-up calls, patient satisfaction surveys, handling post-treatment concerns.

## Patient recare & retention

1. **Objective:** Keep patients engaged with the practice for ongoing care.
2. **Key Procedures:** Recare scheduling, reminder calls/emails, reactivation of inactive patients, loyalty programs.